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2001 Edition



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Statistics Canada
Tourism Statistics Program

Tourism Statistical Digest

2001 Edition

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Canada owes the success of its statistical system to a long-standing partnership between Statistics Canada, the citizens of Canada, its businesses, governments and other institutions. Accurate and timely statistical information could not be produced without their continued cooperation and goodwill.

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This publication was prepared under the direction of:

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This publication was a collaborative effort involving the valuable contribution and assistance of many individuals. Special thanks to the authors, Éline Fournier, Monique Beyrouiti, Jimmy Ruel and Laurie McDougall from the Tourism Statistics Program, Veronica Utovac, Daphne Bennett and Adib Farhat from the Services Division, Jacques Delisle from the Income and Expenditures Accounts Division, Michèle Laliberté and Michel Archambault from the UQAM (Université du Québec à Montréal) Chair in Tourism, Nicolino Strizzi from the Canadian Tourism Commission. Nicolette Douglas from the Greater Vancouver Convention and Visitors Bureau and Michel Goupil from l'Office du Tourisme et des congrès de la Communauté urbaine de Québec.

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FOREWORD

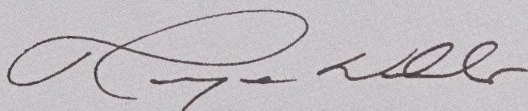
It is with pleasure that we present the 2001 edition of the Tourism Statistical Digest. The report taps into many data sources to draw an up-to-date picture on tourism and travel in Canada by both Canadians and foreign visitors. With a vast array of facts and figures, it is an essential sourcebook for both practitioners and researchers in tourism.

The report builds a picture of both the supply of tourism services and the demand for these services. It highlights the National Tourism Indicators, which measure the importance of tourism to the Canadian economy. While Statistics Canada surveys underlie most of the results, data from other bodies, notably the World Tourism Organisation, are also featured.

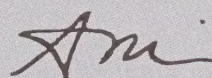
The 2001 edition also provides more interpretation and analysis than the previous edition, released in 1999. Each chapter has a lead article, made possible through the involvement of many analysts.

The Tourism Statistical Digest is the fruit of a collaborative effort by Statistics Canada's Tourism Statistics Program and the Canadian Tourism Commission.

Happy reading.



Maryanne Webber
Director
Culture, Tourism and the Centre
for Education Statistics
Statistics Canada



Scott Meis
Director
Research

Canadian Tourism Commission

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EDITOR'S NOTE

This is the second edition of the Tourism Statistical Digest which was revived in 1999. The format of the publication has been somewhat modified to include articles in each chapter of the 2001 Edition. The Digest still provides a complete summary of statistics on travel and tourism by Canadians and foreign visitors to Canada for reference year 1999.

The Digest is intended for tourism industry managers, policy planners, analysts, researchers, administrators, teachers, students and anyone else with a direct or indirect interest in travel or tourism. It is the fruit of a joint effort by Statistics Canada and the Canadian Tourism Commission, with the assistance of contributors from various organisations.

This edition contains seven chapters and a series of statistical tables from various surveys and other sources. The names of the surveys, along with the associated catalogue numbers, are listed in appendix. Since it was impossible to describe the methodology of each survey included in the list, readers may wish to consult the listed publications for additional information or the latest statistics or analyses.

The Tourism Statistical Digest begins with an overview of global tourism as depicted by World Tourism Organisation data on international arrivals and receipts. *World Trends* describes Canada's status as an international tourist destination. It is followed by an article entitled: *International Travel to Canada – Before and After the Asian Crisis*.

Chapter 2, *Travel by Canadians*, cover tourism national demand using data from two surveys conducted by the Tourism Statistics Program: the Canadian Travel Survey (CTS) and the International Travel Survey (ITS). Travel by Canadians is analysed by destination (intraprovincial, interprovincial, United States and overseas). The article, *Provincial Overview of Domestic Travel*, describes the relative situations of the provincial domestic markets.

Chapter 3, *International Travel to Canada*, covers tourism inbound demand and analyses travel to Canada by origin (United States and overseas). *Canada's Travel Account Since 1980* examines the nature and magnitude of Canada's international travel account deficit, highlighting trends and issues.

Chapter 4, *Passenger Transportation in Canada* uses data from the Transportation Division's various surveys to provide highlights for the various components of the transportation industry (road, air, water and rail). The article, *The "Open Skies" Agreement, a New Start for the Transborder Flights?*, takes a look at the market before and after the agreement.

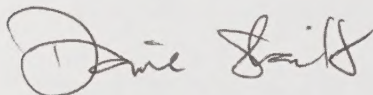
Chapter 5, *Tourism Service Industries*, prepared by the Services Industries Division, examines several other services that contribute to the tourism experience: accommodation, food and beverage service, travel agency and tour operator services. *Tourism and the Trend Towards Consolidation* looks at mergers, acquisitions and alliances in the tourism industry.

Chapter 6, *National Tourism Indicators – 1999 Results* uses information from the Tourism Satellite Account and the National Tourism Indicators, to gauge the importance of tourism in Canada's economy. Individual topics include tourism demand in Canada, tourism GDP (Gross Domestic Product), tourism employment and inflation in tourism products. *The Canadian Tourism Satellite Account: an Analysis of results for 1988 and 1992* presents the TSA results for 1992 and discuss the structural changes that occurred between 1988 and 1992.

Chapter 7 contains two articles on tourism at the subprovincial level. The two articles which feature data taken from *Tourism in Canadian Cities: A Statistical Outlook*, are written by research analysts of two tourism and convention bureaus, those of Vancouver and Quebec city. Both demonstrate how the product is used by Tourism Offices in their marketing program.

A short conclusion rounds out the Digest with a look ahead and describes some of the challenges the industry will face in the next millennium.

I hope you will enjoy reading it.

A handwritten signature in dark ink, appearing to read 'Danielle Shaienks', with a stylized, cursive script.

Danielle Shaienks
Editor

HIGHLIGHTS

International tourism is increasing rapidly throughout the world. In 1999, there were 651 million international arrivals, a 3.8% increase from 1998. Receipts were up 2.8% over 1998 to reach \$455 billion. The strong recovery of tourism in Asia-Pacific in 1999 helped boost international tourist arrivals at national borders to a record.

This expansion of world tourism is reflected in its much greater geographic diversity. In 1950, the 25 million international arrivals were split among a mere 15 countries, whereas in 1999, more than 70 countries and territories attracted over 1 million tourists each. The 15 most popular destinations now account for less than two thirds of international tourism.

Canada ranked seventh among the most popular destinations in the world in 1999, an improvement over its eleventh place in 1995 and tenth place in 1990. The decade ended on a positive note with Canada welcoming a record 19.4 million overnight international travellers, a 3% increase over 1998. Although visitation slowed in comparison to the 7% increase a year earlier, this was the largest number of overnight travellers recorded over the history of the international travel survey.

Overnight travel to Canada by United States residents slowed to a 2% growth rate after posting a double-digit gain (11%) in 1998, when the US dollar strengthened to \$0.68 CND. Overseas travellers made 4.2 million trips of one or more nights to Canada, up 6% in 1999 and recovering from a 7% decline in 1998. Double-digit growth in travel by residents of Asian countries contributed to this increase in 1999. Over the same period, Canada's traditional European markets grew 5%.

With the Canadian economy in good shape, the number of overnight trips made by Canadians in Canada remained steady in 1999, as did overnight travel to overseas destinations. Despite the Canadian dollar's weakness relative to its American counterpart, overnight travel to the United States was up 5% from 1998.

In 1999, the transportation industries accounted for 4.1% of GDP (Gross Domestic Product). Transportation continued to grow faster than the economy as a whole in 1999, as in the previous five years. The passenger transportation industries, for their part, grew substantially in 1999; however, for all modes (air, urban transit, bus, boat and rail), they grew slower than the GDP.

Traveller accommodation industries generated \$11.3 billion in revenue in 1998, representing an increase of 5% over 1997. In 1998, hotels continued to dominate this sector, generating \$8.9 billion in revenue and accounting for close to 80% of total sector revenue.

The food services and drinking places industries constitute a growing sector of Canada's economy, accounting for sales of \$28.1 billion in 1999. Food and beverage services represented 20% of all goods and services purchased by visitors in Canada in 1999. Travel agencies and tour operators generated nearly \$11 billion in gross revenues in 1998.

Tourism spending in Canada topped \$50.1 billion in 1999. Non-residents spent 30% of that amount or \$15.3 billion and 70% or \$34.8 billion were spent by Canadians. The non-residents' share of tourism spending has been steadily increasing in the last ten years. This is consistent with the trend in the number of inbound travellers. Spending by foreign visitors accounted for 22% of total tourism demand in 1989 and 25% in 1994. Outlays by foreign visitors increased 7.7% in 1999 compared to 11.4% in 1998. In comparison tourism spending by Canadians posted a 6.0% increase compared to 5.1% in 1998. The overall combined increase of tourism spending was 6.5%, a slightly reduced pace compared to 1998 (7.0%). Growth originated mainly in transportation.

CHAPTER 1

WORLD TRENDS

*Danielle Shaienks,
Tourism Statistics Program*

Global tourism continued to grow in 1998 despite the financial crisis that affected much of the East Asia/Pacific region¹. However, the strong recovery of tourism in that region in 1999 helped boost international tourist arrivals at national borders to a record 663 million and receipts to US\$455 billion.

Tourism was undoubtedly one of the most remarkable economic and cultural phenomena of the last century. Every year, a growing proportion of the world's population takes part in tourist activities, and for many countries, tourism has become one of the most dynamic sectors of their economy. The last two years have shown that while tourism is vulnerable to external political and economic events, it is now firmly rooted in our cultures. It would appear that people do not stop travelling even when economic conditions are less favourable. Instead, they adjust their travel habits by taking advantage of last-minute bookings, reducing the length of their stay, cutting back on their spending or changing their destination.

This expansion of world tourism is reflected in its much greater geographic diversity². In 1950, the total of 25 million international arrivals was split among a mere 15 countries, whereas in 1999, more than 70 countries and territories attracted over 1 million tourists each. The 15 most popular destinations now account for less than two thirds of international tourism. The market has been penetrated by new destinations, mainly in Eastern Europe, Asia, North Africa, Latin America and the Caribbean. What's more, some of them are now among the most popular international destinations, outdrawing even traditional destinations such as Switzerland and Portugal.

The majority of international trips are taken for pleasure or vacation. In 1998, 62% of international travel was for those purposes, and 18% was for business. One fifth of the trips were for personal reasons, visiting friends and relatives, pilgrimages, health care and other reasons.

Globally, flying and driving are neck and neck as the modes of transportation most frequently used by international tourists, with 43% and 42% respectively. Over the past few years, however, there has been a trend toward increased use of air transportation and away from the automobile.

Text Table 1.1
World Tourism by Region

	Tourist arrivals		Change		Receipts (US\$)		Change	
	1998	1999	98/97	99/98	1998	1999	98/97	99/98
	millions		%		billions		%	
World	626.7	650.5	3.0	3.8	443.0	455.2	0.3	2.8
Africa	25.0	26.5	7.4	6.1	9.9	10.2	4.8	3.4
Americas	119.5	122.3	2.9	2.3	117.2	122.4	0.9	4.4
East Asia/Pacific	88.0	97.5	-0.9	10.8	70.7	75.2	-10.4	6.4
Europe	373.7	380.3	3.4	1.8	232.3	233.1	3.6	0.3
Middle East	15.3	18.1	7.2	18.5	8.7	9.7	-6.7	12.2
South Asia	5.2	5.8	8.0	10.7	4.3	4.6	5.3	7.1

Source: World Tourism Organisation.

In 1998 and 1999, small regions with small market shares (South Asia, Middle East and Africa) posted higher growth rates than the more popular regions of Europe and the Americas.

The East Asia/Pacific region rebounded in 1999, setting a new record of 97 million international visitors, 8 million more than in 1996, just before the onset of the financial crisis. The upswing was particularly beneficial for Malaysia (+43%), Cambodia (+29%), Vietnam (+17%) and China, which, with an 8% increase in visitors, now ranks fifth on the list of the most popular destinations in the world, ahead of the United Kingdom. This followed two years of decline due to the financial crisis.

The Middle East and the countries bordering the Mediterranean enjoyed rapid growth in 1999. Except for Turkey, which tourists avoided because of earthquakes and political instability, North African countries and European

countries such as Portugal, Spain and Greece made tremendous gains in 1999.

Unlike the Gulf War, the crisis in Kosovo did not prompt tourists to stay home but rather to change their destinations³. Thus, fewer tourists went to well-established destinations close to the conflict, such as Poland, Hungary and the Czech Republic, but more tourists ventured off the beaten track to relatively new destinations such as Estonia, Georgia, Iceland, Ukraine and the Russian Federation.

The Americas

In 1999, total tourist arrivals in the Americas were up 2.3% from 1998; this was lower than the world growth rate of 3.8%. North America, which accounts for just over 70% of the arrivals and about 75% of the receipts, generated much of the region's growth. Despite its fairly small market share, Central America posted the highest growth rate in the

The World Tourism Organisation defines the tourism regions as follows:

Africa: Continental Africa, Seychelles, Madagascar, Cape Verde, Réunion

Americas: Continental America, Greenland, West Indies, Bahamas, Cuba, Haiti, Dominican Republic, Hawaii, St-Pierre - Miquelon, Puerto Rico, Falkland Islands

Europe: Continental Europe including Russia, Armenia, Azerbaijan, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldavia, Tajikistan, Turkmenistan, Ukraine, Uzbekistan, Latvia, Lithuania, Gibraltar, Malta, Iceland, Canary Islands, Azores, Andorra, Monaco, Turkey, Cyprus, Israel

East Asia/Pacific: China, Hong Kong, Taiwan, Mongolia, Tibet, Japan, South Korea, North Korea, Singapore, Indonesia, Malaysia, Philippines, Vietnam, Thailand, Laos, Brunei, Australia, New Zealand, Guam, Pacific Islands

Middle East: Saudi Arabia, Yemen, Oman, United Arab Emirates, Qatar, Syria, Lebanon, Kuwait, Bahrain, Jordan, Iraq

South Asia: Iran, India, Pakistan, Nepal, Sri Lanka, Bangladesh, Bhutan, Maldives, Afghanistan

Text Table 1.2

World Tourism in the Americas, 1997-1999

	Tourist arrivals		Change		Receipts (US\$)		Change	
	1998	1999	99/98	98/97	1998	1999	99/98	98/97
	millions		%		current billions		%	
Total, Americas	119.5	122.3	2.3	2.9	117.2	122.4	4.4	0.9
Caribbean	16.0	16.2	1.4	4.4	15.0	15.8	5.6	7.1
Central America	3.5	4.0	15.6	14.4	2.3	2.7	20.9	18.6
North America	84.7	87.0	2.8	0.4	88.2	92.3	4.6	-1.3
South America	15.4	15.1	-2.1	14.4	11.8	11.6	-1.8	8.3

Source: World Tourism Organisation.

Americas, with 15.6% in arrivals and 20.9% in receipts. Arrivals in South America declined by 2.1% in 1999, while in the Caribbean, they edged up only 1.4%, compared with 4.4% the year before.

North America

The flows of tourists between the United States and Canada make up about one third of the total arrivals in North America. Movements in the Canada/U.S. exchange rate were partly responsible for the changes in the region between 1997 and 1999. In 1998, the U.S. dollar rose to an all-time high of CDN\$1.545. Arrivals of American tourists in Canada also set a record that year, and for the first time in 10 years, there were more American visitors to Canada than Canadian visitors to the United States. This was reflected in a 7.0% increase in arrivals in Canada and a 2.8% decline in arrivals in the United States in 1998. However, arrivals in the United States rebounded with an increase of 4.5% in 1999. Over the same year, arrivals in Canada continued to rise (3.2%), while Mexico suffered a 1.8% drop.

The United States was even more dominant in receipts. In 1998, lower U.S. receipts led to a 1.3% decline in total receipts for North America. In 1999, U.S. and Canadian receipts grew by 5.0% and 8.2% respectively.

Trends in arrivals are generally a more reliable indicator of industry performance than variations in receipts, which also reflect fluctuations in the U.S. dollar's exchange rate against the currencies of the main countries of origin. In addition, variations in receipts reflect price changes experienced by the countries during the period. Accordingly, the movements of international receipts must be interpreted with caution.

Canada

When the economy is healthy, tourism expenditures usually grow faster than consumer spending as a whole. During a recession, on the other hand, the impact on tourism spending is rapid and dramatic. Thus, Canada's main markets are highly dependent on the state of the economy.

Text Table 1.3

World Tourism in North America, 1997-1999

	Tourist arrivals		Change		Receipts (US\$)		Change	
	1998	1999	99/98	98/97	1998	1999	99/98	98/97
	millions		%		current billions		%	
North America	84.7	87.0	2.8	0.4	88.2	92.3	4.6	-1.3
United States	46.4	48.5	4.5	-2.8	71.3	74.9	5.0	-2.8
Canada	18.9	19.5	3.2	7.0	9.4	10.2	8.2	6.4
Mexico	19.4	19.0	-1.8	2.4	7.5	7.2	-3.6	4.0

Source: World Tourism Organisation.

Text Table 1.4

Travel to Canada in 1999

Country of origin	Person-trips	Person-trips	Change
	1998	1999	
	thousands		%
Canada	73,302	73,457	0.2
United States	14,893	15,180	1.9
Overseas	3,935	4,187	6.4
France	402	414	3.0
Germany	379	392	3.4
United Kingdom	747	780	4.4
Japan	484	516	6.6
Total	92,130	94,823	2.9

Sources: Canadian Travel Survey and International Travel Survey.

Because the domestic market is Canada's most important market, the performance of the Canadian economy has a major effect on the Canadian tourism industry. The gross domestic product was up 4.0% in 1999, as the economy was booming and turning in its best performance since 1994. With interest rates, inflation and unemployment relatively low, consumer confidence was rising. This prompted Canadians to travel both in Canada and abroad, and they set a record for travel to overseas countries.

Text Table 1.5

Most Popular Destinations Worldwide – Arrivals and Receipts, 1990-1999

Country	Rank			Country	Rank		
	1990	1995	1999		1990	1995	1999
Arrivals				Receipts			
France	1	1	1	United States	1	1	1
United States	2	2	2	Spain	3	4	2
Spain	3	3	3	France	2	3	3
Italy	4	4	4	Italy	4	2	4
China	12	7	5	United Kingdom	6	5	5
United Kingdom	7	5	6	Germany	5	6	6
CANADA	10	11	7	China	25	10	7
Mexico	8	6	8	Austria	7	7	8
Russian Federation	17 ¹	14	9	CANADA	9	12	9
Poland	27	9	10	Greece	24	25	10
Austria	6	10	11	Australia	15	13	11
Germany	9	12	12	Switzerland	8	9	12
Hungary	5	8	13	Russian Federation	23 ¹	22	13
Greece	13	16	14	Mexico	10	17	14
Portugal	14	17	15	China, Hong Kong SAR ²	25	10	15

¹ Former USSR.

² Special Administrative Region.

Source: World Tourism Organisation.

The economy of Canada's second most important market, the United States, grew by 4.2% in 1999. Paralleling this expansion, now in its eighth year, American consumer confidence has risen to its highest level in 30 years. The disposable income of Americans also increased, creating economic conditions highly favourable to the growth of tourism.

Most Popular Destinations

China, Hong Kong, Poland, the Czech Republic and the Russian Federation are attracting increasing numbers of international visitors. They are now more popular than some of the more traditional destinations such as Switzerland, Belgium, the Netherlands and Portugal. In 1999, France remained at the top of the list for international arrivals, followed the United States and Spain. Canada continued its ascent, rising from eighth place in 1998 to seventh in 1999, after holding 11th spot in 1995 and tenth in 1990.

The United States ranked first in global receipts with over 16% in 1999. American dominance in receipts had to do with the fact that tourists visiting the United States spent an average of US\$1,534 per trip, while those visiting Spain and France spent only US\$634 and US\$434 respectively. In Canada, visitors spent an average of US\$510 per trip.

Outbound Tourism

While the industrialized countries of Europe, the Americas and the East Asia/Pacific region are the principal generators of global tourism, recent years have seen a proliferation of originator countries. Europe is the source of almost half of international tourist arrivals, followed by the Americas with one in five. Although these two regions combined account for nearly three quarters of world tourism, their growth rate is slower than the global rate.

The East Asia/Pacific region has been the driving force in the growth of world tourism over the last few decades. With an average annual growth rate of 8.5% between 1985 and 1998, it has seen its contribution to world arrivals increase from 10% to nearly 15% during the same period. Following the slump in 1998, the region resumed its role as world leader in 1999, a role it will probably keep over the next few years, according to the World Tourism Organisation, because of the pent-up demand in the region's countries.

World Exports and International Tourism

Between 1998 and 1999, the value of global exports of goods rose 3% to almost US\$5.5 trillion, while the value of global exports of commercial services increased by 1% to just under US\$1.4 trillion⁴. Tourism receipts, which

accounted for about one third of exports of commercial services in 1999, grew at a faster pace (2.8%).

For more and more countries, tourism is an important source of foreign currency. In its *Tourism Economic Report*, 1st edition, 1998, the World Tourism Organisation noted that tourism was one of the five largest categories of exports for 83% of countries and the main source of foreign currency for at least 38% of them. In 1998, tourism receipts and international transportation costs made up about 8% of total international trade (exports of goods and commercial services).

In 1998, international tourism receipts including transportation costs totalled US\$532 billion, surpassing all other categories of international trade.

Notes

- ¹ World Tourism Organisation, Tourism Highlights 1999.
- ² World Tourism Organisation, Tourism Highlights 2000.
- ³ World Tourism Organisation, Kosovo Crisis Having Less Impact than Gulf War.
- ⁴ World Trade Organisation, World Trade in 1999 - Highlights.

Text Table 1.6

Global Exports of Goods and Commercial Services and Global Tourism Receipts, 1997-1999

	Value			Annual change		
	1997	1998	1999	1997	1998	1999
	billions US\$			%		
Goods	5,300	5,270	5,473	3	-2	3
Commercial services	1,310	1,320	1,350	4	1	1
Tourism receipts	440	443	455	0.7	0.7	2.8

Sources: World Trade Organisation, World Tourism Organisation.

Preliminary Review of 2000

According to preliminary results from the World Tourism Organisation, between 1999 and 2000 the growth rate of world tourist arrivals nearly doubled to 7.4%, its highest level in the decade. Travel to other countries was boosted by a number of international events, including the Olympics, the European soccer championships and Expo 2000. International arrivals totalled 698 million in 2000, and world tourism receipts climbed 4.5% to US\$476 billion during the period. The World Tourism Organisation's preliminary results also indicated that Canada lost its seventh place in the ranking of international destinations to the Russian Federation. The latter posted a gain of 23.2% in international arrivals, moving ahead of such well-established traditional destinations as Germany, Poland and Austria.

International Travel to Canada – Before and After the Asian Crisis

Monique Beyrouti
Tourism Statistics Program

Growth of International Tourism

In keeping with the upward trend worldwide, international travel to Canada (all durations combined) increased by 5.2% for arrivals from overseas and 1.8% for arrivals from the United States in 1999 (*Text Table 1.7*). Between 1998 and 1999, expenditures during those trips jumped by 9.5% and 6.5% for overseas and American visitors respectively. When those expenditures were combined with spending by Canadians on domestic trips, total tourism expenditures in Canada came to \$50.1 billion, up 6.5% from 1998. Employment generated by tourism grew 1.2% during the period.¹ Buoyed by the growth of international travel, the increase in non-resident spending in Canada improved the travel account between Canada and other countries to a deficit of \$1.7 billion. In fact, Canada is becoming a more popular destination, attracting growing numbers of foreigners who spend increasing amounts of money every year. For example, spending rose by 58% (in current dollars) between 1990 and 1999. And since spending by Canadians travelling in foreign countries edged up only 3% over the same period, the result was a 76% improvement in Canada's net travel account between 1990 and 1999.

Text Table 1.7
Non-residents Travel to Canada

	1996	1997	1998	1999	Change	
					98/97	99/98
	thousands				%	
Total travel	43,256	45,076	48,064	49,055	6.6	2.1
U.S.	38,471	40,490	43,858	44,630	8.3	1.8
same day:	25,563	27,089	28,965	29,450	6.9	1.7
overnight:	12,909	13,401	14,893	15,180	11.1	1.9
Overseas	4,786	4,586	4,206	4,425	-8.3	5.2
same day:	409	352	271	239	-23.0	-11.8
overnight:	4,377	4,234	3,935	4,187	-7.1	6.4

Note: Total may not add up due to rounding.

Source: International Travel Survey.

Despite that good news, the tourism industry remains vulnerable to economic, political and other changes, as evidenced by the 1991 Gulf War and, more recently, the economic and financial crisis in Asia. Fortunately, the slowdown in travel growth did not last, and a number of factors led travellers to resume their recreational, personal, business and other activities around the world.

Spending by foreigners travelling in Canada totalled \$13.8 billion in 1999, up about 7.6% from 1998 (*Text Table 1.8*). Expenditures incurred during overnight trips accounted for 87% of the total.

Strong Economic Recovery in Asia

In July 1997, what appeared to be an isolated financial and monetary crisis in Thailand spread rapidly through Southeast Asia, reaching South Korea, Hong Kong and China by the fall of that year. As panic and anxiety reigned, Asians made fewer international trips in 1998. And that's not all: there were 0.9% fewer tourist arrivals in the region between 1997 and 1998. According to OECD estimates, Asia was the only continent that suffered a decline in the number of tourists that year.

In 1999, however, Asian economies began to recover. The situation improved, and Asian countries as a whole saw their economic growth accelerate from 3.8% in 1998 to 6.0% in 1999.² The growth rate of the four “Asian tigers” (South Korea, Taiwan, Singapore and Hong Kong), now classified as developed countries,³ soared to 7.7% in 1999 (from

–2.3% in 1998), highest among the developed countries. In fact, for over 30 years, the “tigers” have been growing at the phenomenal pace of 8.0% a year.

The results for 1999 and early 2000 indicate that the financial crisis failed to snuff out the vitality of the Asian economies.

Solid Recovery in International Travel

Travel to Canada from Overseas Countries up in 1999

Between 1998 and 1999, overnight travel to Canada from overseas countries grew by 6% (*Text Table 1.7*). More residents of every continent except South America visited Canada in 1999 than in 1998. Overall, however, the increase in arrivals actually reflected a recovery in overseas travel to Canada, which had slumped 7% between 1997 and 1998. In fact, in 1999 the number of trips to Canada by overseas residents remained slightly below (1%) its 1997 level.

Impact of the Asian Travel Recovery on Canada

After staying at home a little more for two years, the residents of the East Asia/Pacific region,⁴ buoyed by the economic recovery, resumed travelling in large numbers in 1999. Canada benefited from the recovery of international travel from the region, drawing 108,000 more visitors in 1999 than in 1998. Asian tourists spent \$1.4 billion during their overnight stays in Canada in 1999, up 13% from 1998. Of the four largest Asian markets for Canada, only Hong Kong

Text Table 1.8
Spending by non Residents Travelling in Canada

Origin						Change	
	1996	1997	1998	1999	98/97	99/98	
	thousands				%		
Total Spending	10,796	11,199	12,831	13,804	14.6	7.6	
U.S.	6,258	6,669	8,357	8,903	25.3	6.5	
same day:	1,108	1,314	1,654	1,754	25.9	6.0	
overnight:	5,150	5,355	6,703	7,149	25.2	6.7	
Overseas	4,538	4,530	4,474	4,901	-1.2	9.5	
same day:	17	14	12	9	-14.3	-25.0	
overnight:	4,520	4,516	4,462	4,892	-1.2	9.6	

Note: Total may not add up due to rounding.

Source: International Travel Survey.

Text Table 1.9
Spending by Overseas Visitors in Canada

	One-or-more-night trips								
				Change			Shares		
	1997	1998	1999	98/97	99/98	99/97	1997	1998	1999
					%			%	
Grand Total	4,516	4,462	4,892	-1.2	9.6	8.3			
Total	1,952	2,095	2,202	7.3	5.1	12.8	43	47	45
United Kingdom	687	823	882	19.8	7.2	28.4	15	18	18
France	472	487	465	3.2	-4.5	-1.5	10	11	10
Germany	440	441	481	0.2	9.1	9.3	10	10	10
Italy	105	98	108	-6.7	10.2	2.9	2	2	2
Netherlands	106	114	125	7.5	9.6	17.9	2	3	3
Switzerland	142	132	141	-7.0	6.8	-0.7	3	3	3
Total	1,186	938	1,063	-20.9	13.3	-10.4	26	21	22
Japan	643	520	572	-19.1	10.0	-11.0	14	12	12
Hong Kong	154	145	128	-5.8	-11.7	-16.9	3	3	3
Taiwan-Formosa	199	177	227	-11.1	28.2	14.1	4	4	5
South Korea	190	96	136	-49.5	41.7	-28.4	4	2	3
Mexico	90	112	129	24.4	15.2	43.3	2	3	3
Australia	148	159	194	7.4	22.0	31.1	3	4	4
Mainland China	87	75	80	-13.8	6.7	-8.0	2	2	2

Source: International Travel Survey.

residents visited Canada less often in 1999 than in 1998, a decline that was reflected in lower travel expenditures.

Meanwhile, travel from South Korea grew more rapidly over the same period, posting a 52% increase. The other side of the coin, however, is that arrivals from that country had dropped 56% between 1997 and 1998.

Of the four biggest Asian sources of travellers, only Taiwan sent more tourists to Canada in 1999 than in 1997. Travel from Taiwan to Canada nearly quadrupled during the last decade.

The fact that Taiwan's exchange rate did not fall as sharply as that of other countries explains, at least in part, the solid recovery in travel to Canada.

Finally, Japan, by far the largest source of Asian tourists, had essentially zero economic growth during the last decade. In 1999, Japan's growth rate (0.3%) was the lowest in the industrialized world.⁵ After peaking at 648,000 trips

to Canada in 1996, travel from Japan has declined every year since then.

More European Travellers

In 1999, residents of Europe took 109,000 more overnight trips to Canada than in 1998, a 5% rise. Britons increased their travel to Canada by 4% between 1998 and 1999. The number of visitors from France and Germany was up 3% in 1999 compared with 1998. Nevertheless, they travelled to Canada less often in 1999 than they did in 1995. In 1996, Canada attracted a record number of visitors (all sources combined). With 748,000 visits to Canada in 1999, the United Kingdom was the only country that surpassed its 1996 peak. Even though the value of the pound fell relative to the Canadian dollar over the same period, the decline was small (-1%), and it did not deter Britons from taking 21% more trips to Canada between 1995 and 1999. Of the three largest European tourist markets for Canada, Britons traditionally take proportionally more trips to Canada to visit relatives and friends. In 1999, 35% of British visitors reported

coming to Canada for that purpose. The corresponding proportions for French and German visitors were 27% and 19% respectively. That type of travel, usually less costly because it often does not involve accommodation expenses, appears to be less elastic with respect to exchange rate fluctuations.

Between 1998 and 1999, the number of overseas residents who came directly to Canada and stayed at least one night increased by 6%, while the number who entered via the United States rose by 9%. Since arrivals via the United States grew more quickly, the proportion of direct arrivals dipped from 63% to 62% during the period. Direct arrivals have a greater economic impact because they stay longer and spend more per trip in Canada than travellers who enter via the United States. For example, in 1999 an overseas resident who travelled directly to Canada spent an average of \$1,344 per trip, compared with \$882 for an overseas resident entering Canada via the United States. The increase in direct arrivals in 1999 boosted the corresponding travel receipts by 21%.

All types of travel to Canada by overseas residents were up between 1998 and 1999. Trips for the purpose of visiting friends and family posted the largest increase (8%). Business travel grew by 6%, and pleasure trips rose 5%.

Main Tourism Markets, Before and After the Crisis

While the number of trips to Canada by overseas residents was up in 1999 compared with 1998, it remained 1% lower than in 1997. The crisis of Asian financial markets unquestionably had a negative effect on travel from overseas countries. Indeed, the decline in visitors from overseas between 1997 and 1999 was primarily due to a 19% drop in Asian tourists. The European market shrank by a mere 2% during the same period. Since the number of Asian travellers was down more than the number of European travellers, their share of total receipts fell to 29% in 1999. Nevertheless, the repercussions of the Asian financial crisis appear to have faded. As a result, the proportion of receipts attributable to Asian visitors rose by one percentage point between 1998 and 1999.

Of Canada's biggest tourist markets in Asia, only residents of Taiwan made more visits and spent more in Canada in

1999 than in 1997 (*Text Table 1.9*). The increase in the number of trips to Canada by Taiwanese residents is especially important since of all Asian tourists, they spend the most during visits to Canada. They spend more because they stay in Canada twice as long as travellers from other Asian countries. The Taiwanese market is a very promising one for Canada, having grown by 58% between 1995 and 1999. Taiwan rose from fourth on the list of Canada's top Asian sources of tourists and tourist dollars in 1995 to second in 1999, overtaking South Korea and Hong Kong.

Hong Kong residents curtailed their travel to Canada by 8% between 1997 and 1999. Since they cut back only slightly on the length of their stay and the amount they spent, the net result was a 17% drop in travel receipts from Hong Kong.

Travel to Canada from some European countries was also down, though to a lesser extent than travel from Asia. The decline was partly due to a combination of lower exchange rates relative to the Canadian dollar and increased travel to other European countries. Between 1997 and 1999, residents of France reduced their visits to Canada by 6%, and residents of Germany by 1%. In contrast, the number of French and German tourists visiting Canada jumped by 79% and 76% respectively between 1990 and 1996. The British market, which is generally more stable, experienced less dramatic fluctuations. After taking 25% more trips to Canada in 1996 than in 1990, Britons increased their visits by 6% between 1997 and 1999. Unlike the numbers of French and German visitors, the number of British travellers to Canada has never declined.

The international travel market for the last decade can be divided into two distinct periods. Between 1990 and 1996, the growth rate of overseas travel to Canada (48%) was higher than that of world arrivals (31%). What's more, the period was marked by an explosion in travel throughout the world. The promising Asian market sent 77% more travellers to Canada in 1996 than in 1990. Between 1997 and 1999, however, the number of trips to Canada from Asia dropped 11% to a level lower than in 1996. At the height of Canada's popularity with Asian residents in 1996, 1.5 million of them visited Canada, accounting for 35% of all tourists from overseas countries. That was a few months before the now-famous financial crisis.

International Travel Survey

Methodology

The number of travellers arriving in Canada is recorded by Canada Customs and Revenue Agency officials at every point of entry to Canada and indexed by category and mode of transportation used. All foreign travellers are counted.

Statistics Canada's information on expenditures and the characteristics of international trips is derived from questionnaires distributed by Canada Customs and Revenue Agency officials on a sample basis.

Number of questionnaires completed by travellers:

	1995	1996	1997	1998	1999
American visitors	47,616	46,762	46,056	44,770	43,355
Overseas visitors	14,384	15,838	14,544	11,830	11,944

For more information on the methodology and definitions used in the ITS, please consult the publication *International Travel*, Statistics Canada Catalogue No. 66-201-XPB.

Notes

- ¹ *Statistics Canada*, National tourism indicators: Quarterly estimates, Fourth quarter 1999, *Statistics Canada Catalogue No. 13-009-XPB*, Ottawa, Minister of Industry, 2000.
- ² *L'État du monde – Annuaire économique et géopolitique mondial 2001*. Édition: La Découverte/Boreal.
- ³ *According to the International Monetary Fund (IMF) classification.*
- ⁴ *The East Asia/Pacific region includes northeast Asia, southeast Asia, Australia, Melanesia, Micronesia and Polynesia.*
- ⁵ *The industrialized world includes the United States, Japan, the four "tigers", the European Union, Germany, France, Italy, the United Kingdom and Canada.*

CHAPTER 2

CANADIAN TRAVEL

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With the Canadian economy in solid shape (*Text Table 2.1*), the number of overnight trips made by Canadians in Canada remained steady in 1999, as did travel to overseas destinations. Despite the Canadian dollar's weakness relative to its American counterpart, overnight travel to the United States was up 5% from 1998.

Travel Participation Rates

In 1999, nearly two out of three Canadians took at least one trip during which they spent one or more nights away from home either for pleasure, to visit friends and relatives, or for personal reasons. Half of Canadians took at least one trip within their home province (intraprovincial), one out of five went to another province (interprovincial), and less than one in ten travelled overseas. While these participation rates were virtually unchanged from 1997, the number of trips to the United States declined, as the Canadian participation rate dropped from one out of five in 1997 to one out of seven in 1999. All these participation rates vary by province of residence and by specific demographic characteristics.

Text Table 2.1
Canadian Indicators, 1997-1999

	1997	1998	1999
Gross domestic product (\$ billion)	698.3	721.0	750.0
Consumer Price Index	115.8	118.9	124.3
Unemployment rate (%)	9.2	8.3	7.6
Savings rate (%)	2.2	2.3	1.4
Personal disposable income (current dollars)	17,673	18,297	18,786
Canadian dollar / American dollar	0.72	0.67	0.67
Consumer Confidence Index	115.1	111.6	116.8
Domestic overnight trips (thousands)	64,778	73,302	73,457
Overnight trips to the United States (thousands)	15,127	13,430	14,116
Overseas overnight trips (thousands)	3,984	4,218	4,252

Sources: CANSIM I56001, D14914, P100000, D980404, D14915, B3400, International Travel Survey, Canadian Travel Survey; Conference Board of Canada.

Definition of travel participation rate

Proportion of Canadians who took at least one non-business overnight trip, regardless of distance, in a year, to a destination within the province, to another province, to the United States or to a foreign country other than the United States. The purpose might have been to visit friends or relatives, for pleasure, for personal reasons or for other reasons not related to business. For example, a person who did not travel more than 80 kilometres in Canada could have taken a non-business overnight trip of less than 80 kilometres and still be included in the participation rate but not in the number of trips counted by the CTS.

Definition of trip

For the purpose of the Canadian Travel Survey, a trip is defined as travel to a Canadian destination at least 80 kilometres one way away from home for any reason except commuting, travel for education, travel of crew members, change of residence, travel in ambulance, travel not originating in Canada and trips longer than one year.

For the purpose of the International Travel Survey, a trip begins each time a Canadian resident departs from Canada, and it ends when the traveller returns.

Definition of visit

For the purpose of the Canadian Travel Survey, a visit is the place of overnight stay of the traveller or, for a same-day trip, the location of destination of the trip. For the purpose of the International Travel Survey, a resident traveller may cross into several countries or states before re-entering Canada. Each of these crossings represents a visit.

Residents of Saskatchewan were the most frequent travellers, with 80% of the population having travelled at least once in 1999. They not only travelled more often within their province but also had the second highest interprovincial participation rate. Prince Edward Island residents travelled the most outside their province owing to the small size of the island. In Saskatchewan, the long distances between cities and the large rural population mean that travelling for pleasure (shopping, for example), to visit friends or relatives or for personal reasons (a doctor or dentist appointment) is required more frequently.

British Columbians and Ontarians travelled more often than residents of other provinces, both to the United States and to other countries, as about one out of five travellers went south in 1999 and about one in ten went overseas. The proximity of large American cities draws travellers from the two provinces south of the border rather than east or west in Canada. While the proportion of travellers who went to countries other than the United States was 7% for Canada as a whole, the provincial rate ranged from 2% for residents of Newfoundland and Prince Edward Island to 11% for British Columbians.

Characteristics of Canadian Travel

Many Canadians who took a trip out of their home province in 1999 headed for the country's most populous province, Ontario. Quebec accounted for the highest proportion of interprovincial travellers to Ontario (54%) in 1999. Quebec was also the second biggest source of interprovincial travellers, with 2.8 million interprovincial visits in 1999. Ontario provided the lion's share of Quebec's domestic

Text Table 2.2

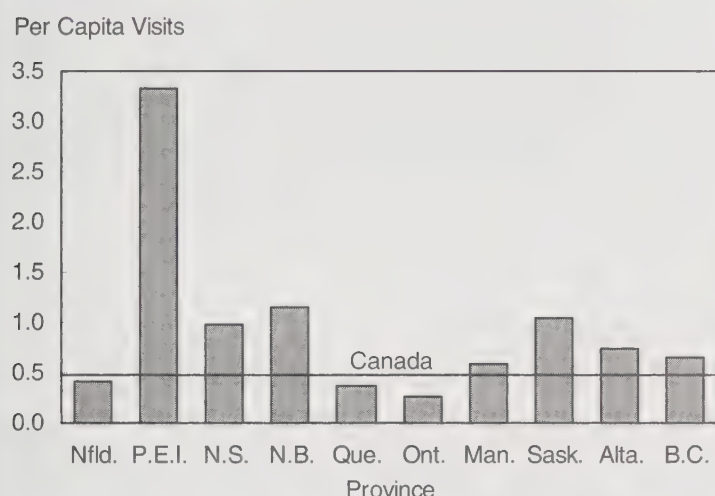
Travel Participation Rates by Province of Residence, Non-Business Overnight Trips, 1999

Province	Total	In Canada	Intra- provincial	Inter- provincial	United States	Other Countries
%						
Canada	64	57	50	20	14	7
Newfoundland	67	66	61	15	2	2
Prince Edward Island	68	66	23	57	8	2
Nova Scotia	65	61	50	30	10	6
New Brunswick	65	62	47	35	10	3
Quebec	58	52	48	12	9	7
Ontario	62	54	49	15	18	9
Manitoba	64	59	44	35	16	4
Saskatchewan	80	79	67	40	9	4
Alberta	70	68	56	36	12	5
British Columbia	71	60	53	23	19	11

Source: Canadian Travel Survey, 1999.

market, accounting for 87% of all visits. This was the largest share of interprovincial travellers for any province. Alberta contributed 68% of British Columbia's non-resident domestic traffic. It also attracted over 2 million non-residents in 1999, with much of its domestic market (46%) coming from British Columbia.

Figure 2.1
Per Capita Interprovincial Visits by Province Visited, 1999



Source: Canadian Travel Survey, 1999.

As Figure 2.1 shows, the provincial rankings are quite different when interprovincial visits are distributed on a per capita basis. Prince Edward Island had the largest number of interprovincial visitors relative to its population. New Brunswick and Saskatchewan ranked second and third with about one visit per person. Ontario attracted the smallest number of interprovincial visitors relative to its population.

Text Table 2.3
Interprovincial Overnight Visits, Ranked by Province of Destination, 1999

Province	Interprovincial visits thousands
Ontario	3,055
Quebec	2,780
British Columbia	2,646
Alberta	2,211
Saskatchewan	1,063
Nova Scotia	917
New Brunswick	863
Manitoba	680
Prince Edward Island	459
Newfoundland	228

Source: Canadian Travel Survey, 1999.

The United Kingdom remained the most popular overseas destination for Canadians in 1999, with an increase of 6% from 1997. The Caribbean area experienced the largest gain in Canadian visitors, who flocked to island beaches to soak up the sun. Cuba is becoming increasingly popular, attracting 74% more Canadians in 1999 than in 1998. It now ranks fourth on the list of Canadians' top overseas destinations, far ahead of Germany and other European countries such as Italy, the Netherlands and Switzerland, which have always been traditional favourites for Canadian travellers.

Text Table 2.4
Top Ten Overseas Countries Visited by Canadians, Overnight Visits, 1999

Country	Country visits thousands
United Kingdom	816
Mexico	608
France	408
Cuba	350
Germany	227
Italy	192
Netherlands	154
Dominican Republic	153
Hong Kong	115
Switzerland	108

Source: International Travel Survey, 1999.

In 1999, New York State was the most popular state destination for Canadians, with over 2 million visits. The state's proximity to Ontario and Quebec, its largest provincial markets, explains much of its popularity. However, Florida, a very popular winter destination, was the state where Canadians spent the most nights (32.5 million) and the most money (\$1.8 billion) in 1999.

Text Tables 2.6 and 2.7 show the characteristics of overnight travel by destination. When Canadians travelled in their own province or elsewhere in Canada, it was mainly to visit friends and relatives. Canadians took their own cars for trips within their home provinces since such trips tend to cover shorter distances than travel outside the province and generally involve visiting friends or family or staying at the cottage. The average one-way distance was 266 kilometres for an intraprovincial trip, compared with 1,070 kilometres for trips outside the home province. Vacationing was also a popular reason for Canadian travel in Canada, although it was more frequently the reason for venturing off Canadian soil. Business trips accounted for nearly 20% of inter-

Text Table 2.5

Top Ten States Visited by Canadians, Overnight Visits, 1999

State	State visits thousands
New York	2,283
Florida	1,690
Washington	1,644
Michigan	1,232
California	1,044
Nevada	682
Maine	661
Pennsylvania	644
Vermont	557
Minnesota	487

Source: International Travel Survey, 1999.

Text Table 2.6

Characteristics of Overnight Travel by Destination, 1999

Characteristics	Intra-provincial	Inter-provincial	United States	Other Countries
	%			
Purpose of trip	100	100	100	100
Non-business	91	81	81	84
Holiday/vacation/pleasure	42	32	52	60
Visiting friends or relatives	41	42	20	18
Other reasons	8	7	9	6
Business	9	19	19	16
Quarter	100	100	100	100
First	18	18	21	35
Second	25	22	25	22
Third	38	40	33	23
Fourth	19	20	21	20
Duration	100	100	100	100
1-3 nights	82	52	50	2
4-9 nights	15	33	35	41
10 or more nights	3	15	16	57
Transportation	100	100	100	100
Automobile	94	65	56	
Air	2	30	35	
Bus	3	3	5	
Train	1	2	-	
Boat	1	-	1	
Direct				85
Via United States				15
Average characteristics	100	100	100	100
Size of travel party	2.3	2.1	2.0	1.8
Distance (km)	266	1,070	-	-
Duration (nights)	2.7	5.4	7.1	16.4
Expenditures per trip (\$)	138	510	840	2,622
Expenditures per night (\$)	50.87	93.80	118.66	160.21

Note: Total may not add due to rounding.

Sources: Canadian Travel Survey and International Travel Survey, 1999.

provincial travel, compared with less than 10% of intraprovincial travel. In keeping with the prevalence of VFR travel, the form of accommodation most commonly used by Canadians travelling in Canada was the homes of friends and relatives. Half of domestic travellers stayed in private accommodation while on trips within their own province or elsewhere in Canada.

It is interesting to note that interprovincial travel and U.S. travel are highly similar in mode of transportation, duration, purpose and seasonality. Nearly one out of three trips between provinces and to the United States was by plane, while cars were used for 65% of interprovincial trips and 56% of trips south of the border.

Text Table 2.7

Characteristics of Overnight Travel by Destination, 1999

Characteristics	Intra-provincial	Inter-provincial	United States	Other Countries
	%			
Type of accommodation	100	100	100	100
Hotel/motel	22	40	35	40
Campgrounds/trailer park	10	6	8	-
Cottage (commercial or private)	16	8	4	-
Home of relatives or friends	49	51	16	13
Other	6	7	5	4
Combinations of two or more	-	-	17	29
Type of expenditure	100	100	100	100
Accommodation	24	20	28	19
Transportation	29	50	37	55
Food and beverages	27	18	17	13
Recreation and entertainment	7	5	8	6
Other	13	7	10	7
Activities (multiple counts)	100	100	100	100
Visiting relatives or friends	57	60	37	44
Shopping	27	36	63	78
Sightseeing	21	37	46	77
Attending a festival/fair/exhibition	4	6	8	12
Attending a cultural event	3	5	10	22
Attending a sports event	6	7	8	6
Visiting a zoo, museum or natural display	2	6	15	37
Visiting a theme park	2	5	10	7
Visiting a national or provincial park	6	12	20	40
Going to a bar or nightclub	8	13	24	44
Participating in sports and outdoor activities	41	35	37	51

Note: Total may not add due to rounding.

Sources: Canadian Travel Survey and International Travel Survey, 1999.

The most popular time to travel to overseas locations was the winter quarter, when Canadians leave for sunnier climates. Since overseas travel is associated with longer distances, and since a large proportion (60%) of overseas trips are for vacations, Canadians spent a longer time away, 16.4 nights on average. As *Text Table 2.7* shows, transportation is the largest expense¹ for all destinations.

Overseas trips were the most expensive type of travel for Canadians because of the long durations and greater distances. On average, Canadian travellers spent more on their trips south of the border than they did when travelling in their home province or to another destination in Canada in 1999. Compared with intraprovincial travellers, Canadians visiting other provinces spent three times as much per trip.

In general, there tends to be less participation in tourist activities in Canada, especially among intraprovincial travellers. Apart from visiting friends or relatives, over one third of such travellers engaged in sports or outdoor activities. Interprovincial travellers took part in slightly more activities such as sightseeing and visiting parks, zoos and museums. On trips outside the country, which are more likely to be for vacation, Canadians participate in a wider range of activities. Participation is even greater on overseas trips than on U.S. trips largely because overseas trips tend to last longer.

Note

- ¹ *Transportation Spending for U.S. and other countries destination includes international fares paid to foreign and Canadian carriers. Total expenditures were reallocated according to the proportion of expenditures reported in detail.*

Provincial Overview of Domestic Travel¹

*Élaine Fournier,
Tourism Statistics Program*

Visiting friends, going to the cottage, discovering a new part of the country, attending a concert or a wedding, seeing a new exhibit, shopping – these are just a few of the reasons that some 13.9 million Canadians took 124 million recreational trips within Canada in 1999. Obviously, leisure is not the only reason Canadians travel; many trips are for business. All purposes combined, Canadians took nearly 143 million domestic trips in 1999.

Benefiting the Canadian economy in general, and the transportation, hotel, restaurant and entertainment industries in particular, receipts from domestic travel by Canadians totalled \$20 billion in 1999, 2.0% of the country's gross domestic product (GDP). According to the Canadian Travel Survey, domestic travel receipts were 1.2 times the receipts generated by international travel in Canada.²

To help the reader understand the dynamics of the domestic travel market in Canada, this article briefly describes the relative situations of the provincial domestic travel markets using one of their most important characteristics, travel expenditures.

How is the Domestic Travel Market Measured?

For many years, volumes of travellers and expenditures have been used to measure the domestic travel markets in Canada. With those yardsticks, it is not surprising that the most populous provinces have long led the country in domestic travel. In other words, for demographic and economic reasons, Ontario, Quebec, British Columbia and Alberta are the largest markets from the standpoint of numbers of travellers and total domestic travel receipts. However, the domestic travel market's importance to a province's economy is not necessarily related to the province's size, nor is its capacity to generate revenue from that market. It may therefore be misleading to measure the travel market's vitality solely on the basis of total expenditures and total trips.

To make comparisons between provinces and present a different picture of Canada's domestic travel market, we will use a number of indicators. First, we

Definition of trip

For the purpose of the Canadian Travel Survey, a trip is defined as travel to a Canadian destination at least 80 kilometres one way away from home for any reason except commuting, travel for education, travel of crew members, change of residence, travel in ambulance, travel not originating in Canada and trips longer than one year.

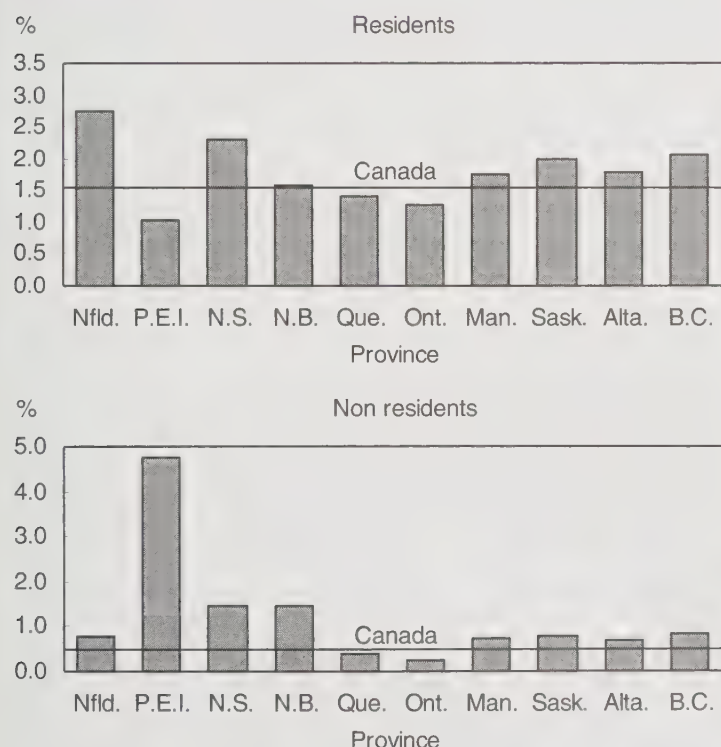
will attempt to determine that market's importance to each provincial economy. An effective way of doing this is to compare travel expenditures with the province's total output of goods and services, or GDP. Second, we want to gauge each province's ability to generate domestic travel revenues; to that end, we will use expenditure per trip, frequency of travel and incidence of travel as indicators.

Relative Importance of the Provinces

Domestic Travel in Prince Edward Island: the Largest Contribution to a Provincial Economy

In Prince Edward Island, the domestic travel market made up a larger share of the economy than in any other province, even though receipts from travel by Prince Edward Island residents accounted for less than 1% of the provincial GDP (Figure 2.2). Total receipts from Canadians travelling in Prince Edward Island made up 5.8% of the province's total output of goods and services, the highest ratio in the country.

Figure 2.2
Domestic Travel Expenditures as a Percentage of GDP by Province, 1999

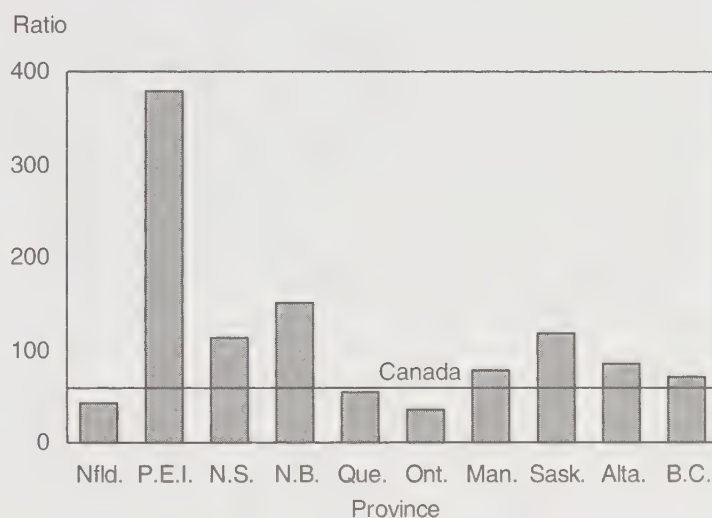


Sources: Canadian Travel Survey, 1999. CANSIM, matrices 9000-9010.

One of the main reasons for the vitality of Prince Edward Island's domestic travel market is the amount spent by non-residents. In 1999, their spending accounted for 4.8% of the province's GDP and over 80% of total travel expenditures by Canadians in the province.

In 1999, the province had 379 non-resident visitors for every 100 residents; this ratio was six times the national average and by far the highest in the country (Figure 2.3).

Figure 2.3
Number of Non-resident Visitors per 100 Residents, per Province Visited, 1999



Sources: Canadian Travel Survey, 1999. CANSIM, matrices 6367-6377.

More than half of the non-resident visitors to Prince Edward Island reported that their trip was mainly for pleasure; the national average was 32%. This was the most lucrative type of travel for the province since it made up 58% of total spending by visitors from other provinces.

The contribution of non-resident travel acquires even greater significance when one considers that Prince Edward Island has the lowest in-province travel participation rate in the country.³ Specifically, only 23% of adult residents⁴ reported taking a trip within their province in 1999 (Text Table 2.8).

In terms of frequency, Prince Edward Island residents took an average of only 1.7 trips within their own province, compared with the national average of 4.1 (Figure 2.4).

Text Table 2.8

Incidence of Trips by Residents, by Province, Excluding Business Trips, 1999

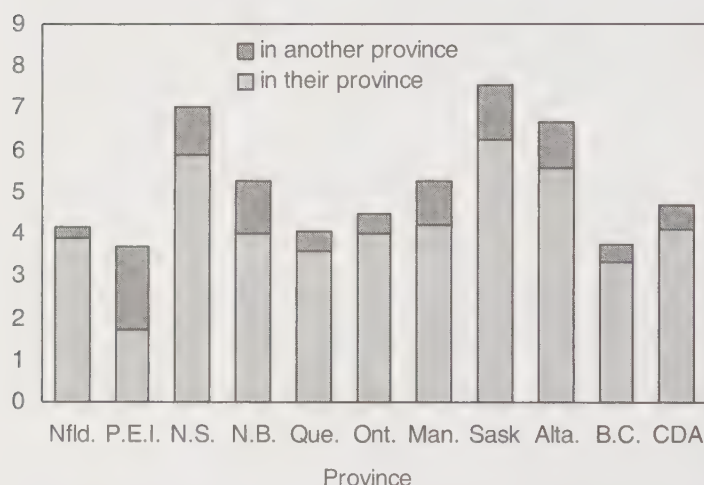
Province of origin	Total	In their province	In another province
		%	
Newfoundland	66	61	15
Prince Edward Island	66	23	57
Nova Scotia	61	50	30
New Brunswick	62	47	35
Quebec	52	48	12
Ontario	54	49	15
Manitoba	59	44	35
Saskatchewan	79	67	40
Alberta	68	56	36
British Columbia	60	53	23
Canada	57	50	20

Source: Canadian Travel Survey. CANSIM 6367-6377.

Figure 2.4

Average Number of Trips by Residents, by Province of Origin, 1999

Average number



Sources: Canadian Travel Survey. CANSIM 6367-6377

Nova Scotia: Large Numbers of Trips for the Size of its Population

In 1999, Nova Scotia had domestic travel receipts of \$840 million, 3.8% of its GDP. Both the resident and non-resident markets brought in substantial revenues.

At 1.4%, the non-resident market's share of the province's economy was almost triple the national average. The size of that market was due in large part to the numbers of visitors

who travelled to Nova Scotia from other provinces. With nearly 1.1 million visitors, Nova Scotia's ratio of non-resident visitors to residents was 1.9 times the Canadian average. On average, interprovincial travellers also spent more in Nova Scotia than they did in Canada as a whole (\$435 compared with \$377).

The strong performance of the intraprovincial market was attributable to a higher frequency of travel than the national average. Adult Nova Scotians took an average of 5.9 trips within their own province in 1999, which places them second in intraprovincial travel frequency, just behind Saskatchewan residents.

Residents of Nova Scotia spent a significant proportion of their personal disposable income on domestic travel: \$45 per \$1,000 of personal disposable income, compared with the national average of \$33.

Newfoundland: Residents Contribute Heavily to the Provincial Travel Market

In 1999, Canadian travellers spent some \$425 million during their trips in Newfoundland (*Text Table 2.9*). Those expenditures made up 3.5% of the province's GDP, which placed Newfoundland third in terms of the domestic travel market's importance to the economy. As is the case for the majority of the provinces, residents generated the lion's share of travel expenditures in Newfoundland (78%).

More than six out of ten Newfoundlanders travelled within their own province in 1999, which put them in second place

Text Table 2.9

Domestic Travel Expenditures by Source, by Province, 1999

Receiving province	Total	Residents	Non residents
	millions		
Newfoundland	425	332	93
Prince Edward Island	172	30	142
Nova Scotia	840	516	324
New Brunswick	559	288	271
Quebec	3,636	2,884	752
Ontario	6,011	5,023	988
Manitoba	762	543	219
Saskatchewan	836	596	240
Alberta	2,874	2,101	773
British Columbia	3,419	2,439	980
Canada	19,567¹	14,753	4,814¹

¹ The Canada total exceeds the sum of the provinces because it includes the Yukon and the Northwest territories

Source: Canadian Travel Survey.

in incidence of intraprovincial travel. Their intraprovincial travel spending was also very high, averaging \$206 per person per trip (*Text Table 2.10*). Overall, it accounted for 2.7% of the province's GDP, the highest ratio in the country. Of all Canadians, Newfoundland residents devoted the largest share of personal disposable income to travel within their own province in 1999, namely \$39 per \$1,000 (*Figure 2.5*).

Text Table 2.10

Average Spending During a Domestic Trip, by Province, 1999

Receiving province	Total	Residents	Non residents
		dollars	
Newfoundland	313	206	600
Prince Edward Island	384	81	409
Nova Scotia	259	111	435
New Brunswick	231	120	322
Quebec	178	148	274
Ontario	185	147	342
Manitoba	210	127	340
Saskatchewan	178	127	282
Alberta	249	163	437
British Columbia	341	224	569
Canada	219	155	377

Source: Canadian Travel Survey.

Despite its physical distance from other provinces, Newfoundland also succeeded in keeping its non-resident travel receipts at a higher percentage of GDP than the national average. In 1999, visitors from other provinces spent some \$93 million, 0.8% of the province's GDP. At \$600, their average expenditures were the highest in the country. Since the province had one of the lowest visitor-to-resident ratios in the country (42 visitors per 100 residents), those expenditures are the reason for the non-resident market's comparative buoyancy.

New Brunswick: Non-residents Play an Important Role in the Travel Market

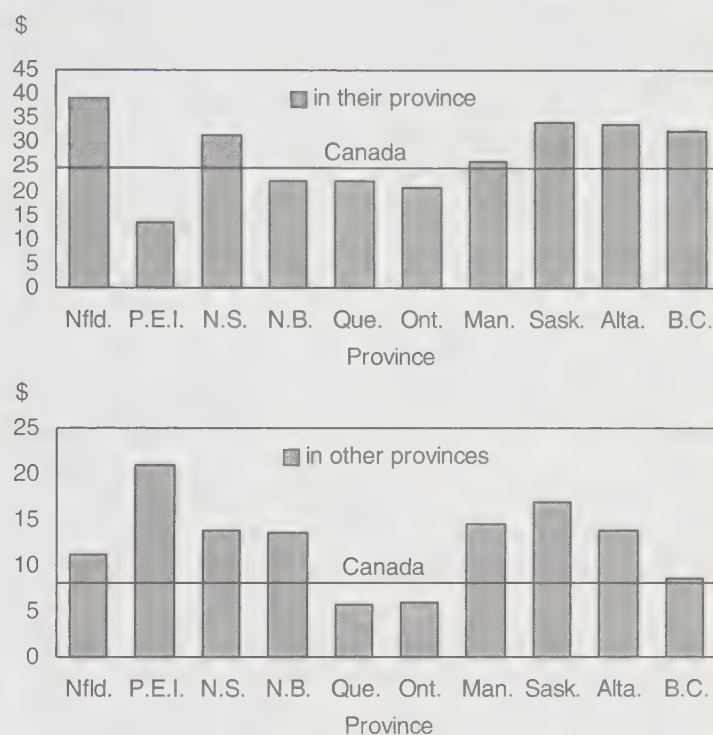
Domestic travel receipts made up 3.0% of New Brunswick's GDP, fourth highest in the country.

New Brunswick residents accounted for 52% of domestic travel expenditures in the province, compared with the national average of 75%.

The province had large numbers of non-resident visitors. In 1999, it received 151 travellers from other provinces for every 100 residents, the second-highest ratio in the country

Figure 2.5

Average Propensity to Spend on Domestic Travel per \$1,000 Personal Disposable Income, by Province, 1999



Sources: Canadian Travel Survey, 1999. CANSIM matrices 9205-9215, 6367-6377.

after Prince Edward Island. However, non-residents spent less per trip in New Brunswick than anywhere else in Canada except Quebec and Saskatchewan. On the other hand, they generated receipts of about \$271 million, 1.5% of the province's GDP. In New Brunswick's case, this performance indicator was 2.9 times the national average.

British Columbia: High Travel Expenditures

In 1999, British Columbia ranked fifth in the importance of domestic travel to its economy. The ratio of total domestic travel receipts to the province's output of goods and services was 2.9%.

In 1999, expenditures per person per trip in British Columbia were among the highest in the country, at \$224 for residents and \$569 for non-residents. The province's ratio of non-resident visitors to residents was just above the Canadian average. In addition, since non-residents spent more per trip, travel receipts from their visits were among the best in Canada. Specifically, they totalled \$980 million, only slightly less than Ontario's total.

Despite the size of the non-resident travel market, the ratio of non-resident travel expenditures to the province's GDP was about 0.8%, roughly the same as in Newfoundland and Saskatchewan. On the other hand, British Columbia's GDP is ten times Newfoundland's GDP and four times Saskatchewan's.

Saskatchewan: a Province of Travellers

In 1999, Saskatchewan had the sixth-highest ratio of domestic travel receipts to GDP, 2.8%.

In a nutshell, non-residents made many visits to Saskatchewan and residents travelled a great deal in their own province, but their spending per trip was low. More than two thirds of adult residents took at least one trip in their province in 1999, averaging 6.3 trips during the year. These were the highest incidence and frequency of intraprovincial travel in the country, and they partially offset the impact of low spending per-trip on total expenditures.

For every \$1,000 of personal disposable income, residents spent an average of \$34 on travel within their own province, second only to Newfoundlanders. In all, intraprovincial travel expenditures made up 2.0% of Saskatchewan's GDP.

Saskatchewan residents not only travelled substantially in their own province, but they also crossed the border into other provinces often and in large numbers during the year. Two out of five adults took at least one interprovincial trip in 1999, averaging 1.3 interprovincial trips, which is twice the national average.

Non-residents also took numerous trips to Saskatchewan. There were 1.2 million visitors to the province in 1999, a ratio of 118 visitors per 100 residents, almost twice the Canadian average. Receipts from those non-resident travellers amounted to 0.8% of the province's GDP.

Alberta: Many Trips and High Travel Expenditures

In Alberta, as in Manitoba, domestic travel receipts made up 2.5% of GDP. The province ranks seventh in terms of the importance of domestic travel to its economy. Like some of its sister provinces, Alberta had high domestic travel expenditures in both the resident and non-resident markets in 1999.

The vitality of the resident travel market is related to several factors. First, like the residents of Saskatchewan, Albertans

travel a great deal. In 1999, 56% of them took at least one trip within their own province; this is the third-highest incidence of intraprovincial travel in the country. Albertan travellers also reported a high frequency of intraprovincial travel, averaging 5.6 trips, compared with the Canadian average of 4.1. Spending during those trips averaged \$163, which placed Albertans third behind Newfoundlanders and British Columbians.

The non-resident travel market was also very healthy. In 1999, 2.5 million travellers from other provinces visited Alberta, spending \$437 per person per trip. Receipts from non-residents totalled nearly \$773 million, 0.7% of the province's GDP.

Manitoba: Residents Travel Often in their Own Province

As in the case of Alberta, domestic travel receipts accounted for 2.5% of Manitoba's GDP; 1.8% was generated by residents, and 0.7% by non-residents.

The province's ability to generate travel spending by its residents was above the national average. In contrast to the general pattern, however, the high travel expenditures by Manitobans were mainly due to the fact that they travelled often. While Manitobans spent less per trip than the Canadian average, they had the fourth-highest frequency of intraprovincial travel in the country, 4.2 trips per resident. With regard to the proportion of domestic travel expenditures contributed by residents, Manitobans' travel habits were similar to those of their Prairie neighbours.

Manitoba received 78 non-resident visitors per 100 residents, 18 more than the Canadian average. Non-residents travelling in Manitoba spent \$340 per trip.

Quebec: High Travel Expenditures, Homebody Residents

With close to one-fifth of all domestic travel spending in Canada, Quebec ranked second in total domestic travel expenditures. At \$3.6 billion, those expenditures made up about 1.8% of the province's GDP. Quebec was placed second-last in terms of the domestic travel market's share of the provincial economy.

In view of the Quebec economy's strength and diversity, it is no surprise to find that the domestic travel market is not as important as in other provinces. Moreover, according to other indicators, the market was showing some signs of weakness.

In general, the number of travellers and the amount they spend in Quebec are below the Canadian average in both the resident and non-resident markets. In the resident market, less than half of Quebecers aged 15 and over reported travelling in their own province in 1999; they averaged 3.6 trips during the year. They spent an average of \$148 per trip, which is below the national average. As a result of all these factors, Quebecers spent only \$22 per \$1,000 of disposable income on intraprovincial trips.

In the non-resident market, Quebec had only 54 visitors per 100 residents, which is less than the Canadian average of 60. Visitors spent an average of \$274 per trip in the province, the lowest average in the country.

Ontario: Highest Domestic Travel Expenditures, Smallest Share of the Economy

In 1999, Ontario led all other provinces in domestic travel expenditures within its borders, capturing nearly a third of total receipts from Canadians travelling in Canada.

However, as in Quebec's case, the domestic travel market's share of the provincial economy was below the national average. Domestic travel receipts accounted for only 1.5% of Ontario's GDP, the lowest ratio in the country. Given the size and diversity of the province's economy, that is hardly unexpected. As in Quebec though, other indicators pointed to some weaknesses in Ontario's domestic travel market. For example, residents travelling in their own province spent, on average, \$8 less than the Canadian average.

In the non-resident market, Ontario attracted only 34 visitors per 100 residents in 1999, the lowest ratio in the country. In addition, non-residents travelling in Ontario spent an average of \$342, compared with the national average of \$377.

Conclusion

Because of existing disparities, some Canadian provinces have higher domestic travel receipts than others. It is important to keep in mind, however, that even for provinces which are not among the leaders, those receipts play an important role in the economy. A province that has comparatively low receipts may still have a dynamic, buoyant domestic travel market, as we have seen in the cases of Prince Edward Island, Newfoundland and Saskatchewan.

Notes

- ¹ This text is an update of an article published in *Travel-Log*, catalogue no. 87-003-XPB vol.15 no.3 entitled *Provincial Overview of Domestic Travel in 1994*. The author of this article was Sylvie Bonhomme.
- ² Data on expenditures of foreign travellers in Canada are from the International Travel Survey (ITS). Receipts include international fares paid to Canadian carriers.
- ³ In Prince Edward Island, because distances are short, the rate of travel at least 80 kilometres one way is low.
- ⁴ Unless otherwise noted, an adult is defined as a person aged 15 or over.

CHAPTER 3

INTERNATIONAL TRAVEL TO CANADA

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The decade ended on a positive note with Canada welcoming a record 19.4 million overnight international tourists, a 3% increase over 1998. Although visitation slowed in comparison to the 7% increase a year earlier, this was the largest number of overnight visitors recorded over the history of the international travel survey. Travel by United States residents slowed to a 2% growth rate after posting a double-digit gain (11%) in 1998, when the U.S. dollar strengthened to \$0.68 CND. Overseas travellers made 4.2 million trips of one or more nights, up 6% in 1999 recovering from a 7% decline in 1998. Double-digit growth in travel by residents of Asian countries, contributed to this increase in 1999. Over the same period, Canada's traditional European markets grew 5%.

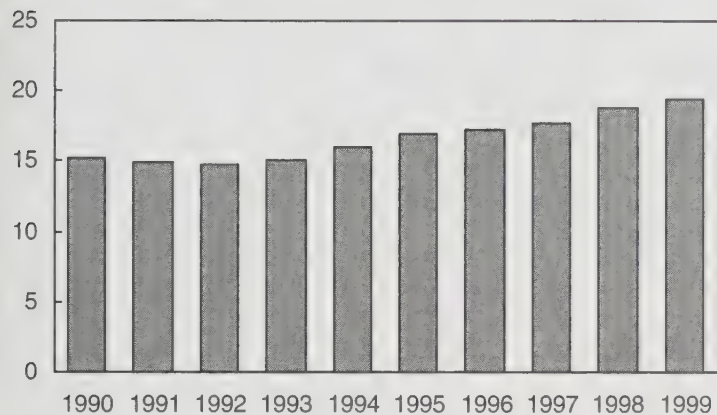
As shown in *Figure 3.1*, throughout most of the 1990s international travel to Canada has been on an upward trend. Visitation dipped slightly in 1991 and 1992, influenced perhaps by a worldwide economic slowdown, the Gulf War and a strengthening of the Canadian dollar. As economic conditions improved in countries around the world, travel to Canada climbed steadily from 1993 to 1996, largely driven by gains in travel from overseas markets. A stellar performance by the U.S. market occurred in 1998 as the Canadian dollar fell and the American economy flourished. Declines in travel by overseas residents were particularly acute in 1998, when most Asian countries were affected by the Asian crisis, and curtailed their travel to Canada and elsewhere around the world (*Text Table 3.1*). The closing of the decade witnessed a slowdown in the American market but the beginning of a recovery in some Asian markets.

United States Travel to Canada Surpasses Reverse Flow of Canadians

In 1999, the number of overnight trips by American travellers topped 15 million for the first time ever over the history of the survey. Furthermore, for the second year in a row, the number of American overnight trips into Canada surpassed the number of trips by Canadians travelling south of the border (*Figure 3.2*). Throughout most of the decade, the reverse was true. Americans also spent more nights in Canada in 1999, the highest level recorded over the 1990s.

Figure 3.1
International Overnight Trips to Canada, 1990 to 1999

Millions of overnight person-trips



Source: International Travel Survey.

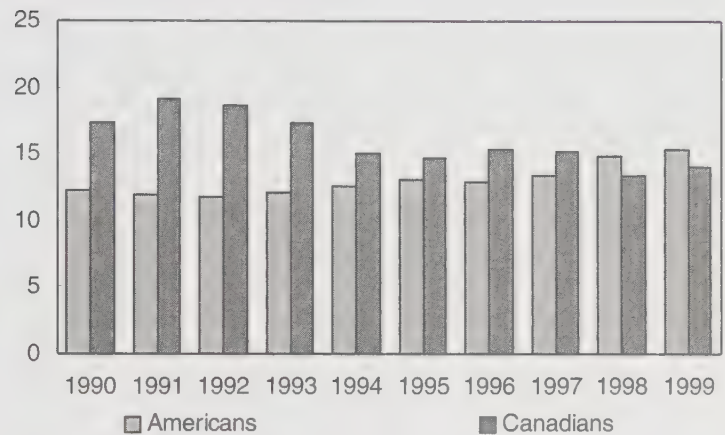
Text Table 3.1
International Overnight Trips to Canada, 1990 to 1999

	Total	United States	Other Countries
	thousands		
1990	15,210	12,252	2,958
1991	14,912	12,003	2,910
1992	14,741	11,819	2,922
1993	15,105	12,024	3,081
1994	15,972	12,542	3,429
1995	16,932	13,005	3,927
1996	17,285	12,909	4,377
1997	17,636	13,401	4,234
1998	18,828	14,893	3,935
1999	19,367	15,180	4,187
Percentage Change	%		
1991/90	-2.0	-2.0	-1.6
1992/91	-1.1	-1.5	0.4
1993/92	2.5	1.7	5.4
1994/93	5.7	4.3	11.3
1995/94	6.0	3.7	14.5
1996/95	2.1	-0.7	11.5
1997/96	2.0	3.8	-3.3
1998/97	6.8	11.1	-7.1
1999/98	2.9	1.9	6.4

Source: International Travel Survey.

Figure 3.2
Overnight Trips by Canadians Travelling to the United States and by Americans Travelling to Canada, 1990 to 1999

Millions of overnight person-trips



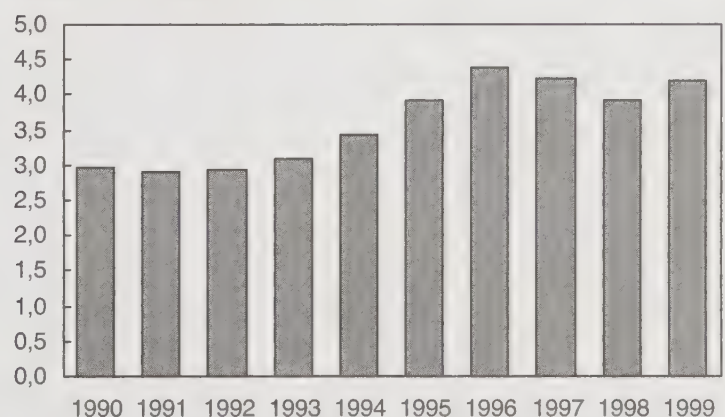
Source: International Travel Survey.

Overseas Travel to Canada on Upward Trend

Residents from countries other than the United States took 4.2 million one or more night trips to Canada in 1999, up 6.4% from 1998 and the first increase since 1996 (*Figure 3.3*). Overseas trips to Canada still remain below the peak of 4.4 million trips obtained in 1996, when Asian and some European travel markets posted record levels. European markets expanded 5% in 1999, following two years of decline. At 2.3 million trips in 1999, travel by Europeans was at a record high in 1999 (*Figure 3.4*). Visitors from the

Figure 3.3
Overnight Trips by Residents of Countries Other Than the United States, 1990 to 1999

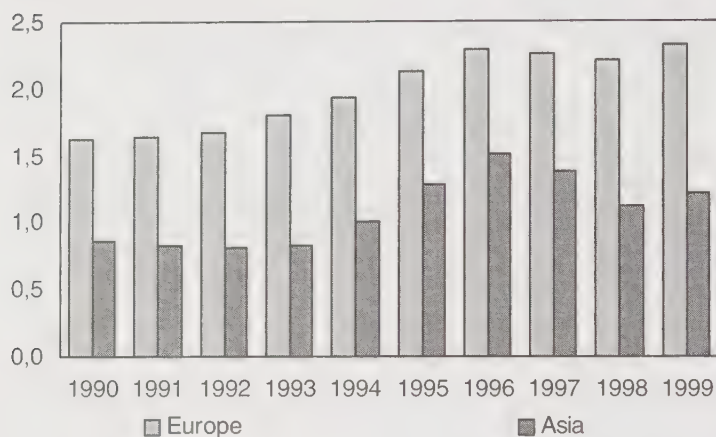
Millions of overnight person-trips



Source: International Travel Survey.

Figure 3.4
Overnight Trips to Canada by Residents of Europe and Asia, 1990 to 1999

Millions of overnight person-trips



Source: International Travel Survey.

United Kingdom were largely responsible for the overall gain in overseas travel to Canada. Travel from Asian markets rebounded 10% in 1999, after dropping 19% the previous year.

Markets Shift as Asian Markets Start to Recover

The United Kingdom, Canada's largest overseas market, accounted for 780,000 trips in 1999; the largest volume of overnight trips ever recorded to Canada (*Text Table 3.2*).

Canada has enjoyed relatively solid growth in trips from the UK over the past decade, with an average annual increase of about 5%. The Japanese travel market on the other hand, grew slightly less than 7% in 1999 to 516,000 trips, still well below the high of 653,000 trips recorded in 1996 (*Text Table 3.3*). The Asian crisis and generally poor economic conditions in 1997 and 1998 have resulted in two years of decline from this market. France and Germany, the third and fourth largest markets, picked up slightly in 1999 following two consecutive years of decline. Visits from both of these countries peaked in 1996.

Travel from Taiwan jumped 26% in 1999 to 155,000 overnight trips, this market's best performance over the decade. Trips by the Taiwanese did not fall off in 1997, as did most Asian markets (*Text Table 3.4*). Visits slowed to an increase of about 5% and dropped by 11% in 1998, but for the decade as a whole, the annual average growth was 33%. Among the top ten overseas markets this was the highest growth rate.

After reaching a peak of almost 200,000 overnight trips in 1996, Hong Kong tumbled to 134,000 by the close of the decade. As a result, Taiwan replaced Hong Kong as the fifth largest overseas tourist market while Hong Kong fell to seventh position. Australia also pulled ahead of Hong Kong with 152,000 trips, up 5% over 1998. The number of Mexican tourists to Canada increased steadily throughout most of the 1990s, rising from just 58,000 in 1990 to 127,000 in 1999. As a result, Mexico is now Canada's 8th most important overseas travel market.

Text Table 3.2

Canada's Top 10 Overseas Countries of Origin for Overnight Visitors to Canada, 1999

	1999					
	Trips	Nights	Spending	Average Duration	Average Spending:	
	thousands	thousands	millions \$	nights	Per Trip \$	Per Night \$
United Kingdom	780	8,725	883	10.8	1,159	108
Japan	516	3,192	572	6.6	1,146	174
France	414	4,895	465	12.9	1,053	82
Germany	392	5,158	481	12.3	1,073	87
Taiwan	155	2,628	227	14.2	1,541	108
Australia	152	1,835	194	11.9	1,300	109
Hong Kong	134	1,198	128	9.7	988	102
Mexico	127	1,126	130	9.6	1,263	131
Netherlands	121	1,609	125	13.0	1,142	88
Italy	111	1,257	108	9.7	968	100

Source: International Travel Survey, 1999.

Text Table 3.3

Overseas Travel to Canada by Selected Key Markets, 1990 to 1999

	One or more night trips				Percentage Change			
	UK	Japan	France	Germany	UK	Japan	France	Germany
	thousands				%			
1990	553	411	259	253				
1991	530	393	307	273	-4.2	-4.4	18.5	7.9
1992	536	392	310	290	1.1	-0.3	1.0	6.2
1993	562	409	361	339	4.9	4.3	16.5	16.9
1994	577	481	410	367	2.7	17.6	13.6	8.3
1995	641	591	430	421	11.1	22.9	4.9	14.7
1996	691	653	460	448	7.8	10.5	7.0	6.4
1997	734	566	439	398	6.2	-13.3	-4.6	-11.2
1998	747	484	402	379	1.8	-14.5	-8.4	-4.8
1999	780	516	414	393	4.4	6.6	3.0	3.7
Annual growth rate 1990 to 1999					4.6	2.8	6.6	6.1

Source: International Travel Survey.

Text Table 3.4

Overseas Travel to Canada by Selected Emerging Markets, 1990 to 1999

	One or more night trips				Percentage Change			
	Taiwan	Hong Kong	Mexico	South Korea	Taiwan	Hong Kong	Mexico	South Korea
	thousands				%			
1990	39	83	58	34				
1991	41	121	65	40	5.1	45.8	12.1	17.6
1992	41	119	65	38	0.0	-1.7	0.0	-5.0
1993	45	116	73	40	9.8	-2.5	12.3	5.3
1994	64	130	81	78	42.2	12.1	11.0	95.0
1995	98	173	63	112	53.1	33.1	-22.2	43.6
1996	132	199	81	159	34.7	15.0	28.6	42.0
1997	138	147	96	147	4.5	-26.1	18.5	-7.5
1998	123	148	112	65	-10.9	0.7	16.7	-55.8
1999	155	134	127	99	26.0	-9.5	13.4	52.3
Annual growth rate 1990 to 1999					33.0	6.8	13.2	21.2

Source: International Travel Survey.

Characteristics of International Travellers

Overseas Travellers More Likely to Travel for Visiting Friends or Family than U.S. Travellers

As indicated in *Text Table 3.5*, 56% of U.S. travellers come to Canada for a vacation compared to 49% for overseas countries. Travel for visiting friends or family was more prevalent among overseas travellers (28%) than among American travellers (19%). Strong historical ties with countries such as the United Kingdom contribute to the high influx of travellers from overseas visiting friends and relatives. In 1999, 30% of European travel to Canada was for this reason compared to 24% for Asian markets. However, over the past decade the share of travel to visit friends and relatives has declined as non-traditional markets have expanded. Business travel accounts for 16% of international trips overall, and slightly more among the overseas markets (18%).

Text Table 3.5

Distribution of Overnight Trips to Canada by Purpose of Trip, 1999

	Total	United States	Other Countries
	%		
Total All Purposes	100	100	100
Non-Business	84	85	82
Holiday/Vacation	56	56	49
Visiting Friends or Relatives	20	19	28
Other Reasons	8	10	5
Business	16	15	18

Source: International Travel Survey, 1999.

Air Travel Continues to Rise

American tourists usually travel to Canada by car (*Text Table 3.6a*), although over the past ten years more and more Americans are opting for air travel. In 1999, Americans took 3.8 million overnight trips by plane, up 4% from 1998 and 59% from 1990. In contrast, auto overnight travel increased only 2% to 9.6 million from 1998 and 15% compared to the start of the decade.

The vast majority of overseas travellers travel directly to Canada by air (*Text Table 3.6b*). In 1999, approximately 2.6 million overseas travellers came directly to Canada by air, up 5% since 1998 and 68% since 1990. A further 1.6

Text Table 3.6a

United States Travellers to Canada by Mode, 1999

	Trips	Percentage Change 1999/98	Share
	thousands	%	
Total	15,179	2	100
Auto	9,609	2	63
Air	3,760	4	25
Bus	810	1	5
Boat	287	-11	2
Other	713	-4	5

Source: International Travel Survey, 1999.

Text Table 3.6b

Overseas Travellers to Canada by Entry Type, 1999

	Trips	Percentage Change 1999/98	Share
	thousands	%	
Total	4,186	6	100
Direct	2,595	5	62
Via the U.S.	1,591	9	38
By land	568	-5	14
By air or sea	1,023	20	24

Source: International Travel Survey, 1999.

million overseas residents travelled to Canada via the United States, 9% more than in 1998. Most of this increase was due to air travel, which jumped 20% between 1998 and 1999. In comparison, land travel decreased 5% over the same period.

Overseas Travellers Combine Commercial and Private Accommodation

Overseas travellers use a combination of commercial and private accommodation while in Canada – a reflection of their longer trips to Canada and their greater propensity to visit friends or family (*Text Table 3.7*). In 1999, overseas tourists used combinations of two or more private and commercial accommodation for 43% of their nights compared to 20% for U.S. travellers. Hotels and motels were the next most popular accommodation for overseas travellers accounting for approximately one-quarter of their nights. For U.S. travellers hotels were the most frequently used accommodation in Canada, followed by homes of

friends or family. American travellers tended to stay in cottages and campgrounds more often than overseas travellers to Canada.

Text Table 3.7

Distribution of Nights Spent in Canada by Type of Accommodation, 1999

	Total	United States	Other Countries
		%	
Total All Accommodation	100	100	100
Hotel/Motel Only	35	42	26
Home of Friends/Relatives Only	20	16	25
Other Only	5	6	3
Cottage	6	10	1
Camping	4	6	2
Combinations of Two or More	30	20	43

Source: International Travel Survey, 1999.

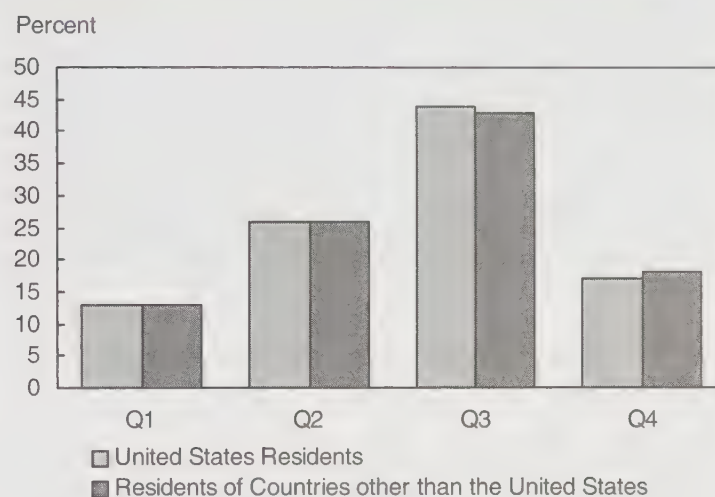
U.S. and Overseas Residents Travel to Canada at Similar Times of the Year

The seasonality of the Canadian tourism industry is demonstrated in *Figure 3.5*, which highlights international travel to Canada by quarter. Whether visitors hail from south of the border or across the ocean, they prefer to visit Canada in the third quarter (July to September) with 44% of overnight trips occurring in that period (*Text Table 3.8*). Although the industry and government have made some inroads on marketing Canada at non-peak seasons, particularly the shoulder seasons, most demand continues to fall in the summer months. Approximately 26% of international trips are taken in the spring, the second busiest period. The winter quarter draws a 13% share of trips from both the U.S. and

overseas. In 1999, winter travel by Americans jumped 11% largely due to an increase in ski trips to Canada. About one in five U.S. trips to Canada in the first quarter of 1999 involved downhill skiing as an activity.

Figure 3.5

International Overnight Travel to Canada by Quarter, 1999



Source: International Travel Survey, 1999.

Overseas Travellers Stay Longer on Average Than Americans Do

When overseas travellers come to Canada, they stay approximately 11 nights compared to just 4 nights for American travellers (*Text Table 3.9*). The tendency of Americans to take short auto trips from states neighboring Canada partly explains the shorter length of stay. When Americans travel by plane they stay longer especially if they are travelling for non-business reasons.

Text Table 3.8

Distribution of Overnight Trips to Canada by Quarter, 1999

Year	Trips			Percentage Change 1999/98		
	Total	United States	Other Countries	Total	United States	Other Countries
		%			%	
Year	19,365	15,179	4,186	2.9	1.9	6.4
First quarter	2,551	2,008	543	10.9	11.3	9.4
Second quarter	4,976	3,885	1,091	1.2	0.9	2.2
Third quarter	8,429	6,631	1,798	2.1	1.0	6.2
Fourth quarter	3,409	2,655	754	1.7	-0.7	11.2

Source: International Travel Survey, 1998 and 1999.

Text Table 3.9

Distribution of Overnight Trips to Canada by Duration, 1999

Duration	Total	United States	Other Countries
		%	
Total	100	100	100
1-3 nights	53	63	19
4-6 nights	21	21	21
7-9 nights	12	11	16
10-13 nights	6	3	15
14-20 nights	5	2	16
21 or more nights	3	1	13
Average Duration (nights)	..	3.9	11.3

Source: International Travel Survey, 1999.

Overseas Travellers Visit Parks, Museums and Historic Sites

As shown in Text Table 3.10, shopping is a near-universal activity, undertaken by at least eight out of ten overseas travellers to Canada. This was also the most popular activity for American tourists with six out of ten visiting Canadian stores in 1999. Sightseeing ranked a close second, as most tourists are involved in this activity unless they are travelling for strictly business or personal reasons. Canada's parks and historic sites are a favourite pastime for many international travellers to Canada. The overseas market showed a stronger penchant for Canada's natural beauty with over half reporting visiting parks and or historic sites compared to 34% for Americans. Visiting friends or family was another frequently reported activity among overseas travellers (54%), but was less commonly cited by Americans (30%).

Sports or outdoor activities were reported by three out of ten international tourists. Americans were more apt to go fishing or hunting as 8% of their trips involved this activity compared to just 3% of overseas tourists. Museums, galleries, zoos and natural displays were included on the itinerary of 25% of tourists, although this activity was much more prominent on trips from overseas (40%). International tourists got a taste of Canadian culture through nightlife/entertainment activities (21%), cultural events (12%), and festivals (9%).

Ontario Attracts a Larger Share of U.S. Versus Overseas Travellers

A substantially larger share of Americans visit Ontario compared to travellers from other countries (Figure 3.6). On the

Text Table 3.10

Top Ten Activities Participated in by International Travellers to Canada, 1999

Activity	Total	United States	Other Countries
		%	
Total Trips¹	100	100	100
Shopping	66	62	81
Sightseeing	61	56	77
Dining at high quality restaurants	44	44	45
Visiting parks or historic sites	39	34	55
Visiting friends or relatives	35	30	54
Participating in sports/ outdoor activities	30	30	30
Visiting a zoo, museum or natural display	25	21	40
Participating in nightlife/ entertainment	21	20	22
Attending cultural events	12	11	15
Attending festivals or fairs	9	8	12

¹ The sum of percentages exceeds the total (100%) since travellers may participate in more than one activity per trip.
Source: International Travel Survey, 1999.

other hand, overseas travellers were more likely than their US counterparts to visit Alberta in 1999: 14% versus 6%. British Columbia received a similar distribution of U.S. and overseas tourists while Quebec attracted a slightly higher share of overseas tourists. Approximately the same proportion spent at least one night in the Atlantic region.

Figure 3.6

Distribution of International Overnight Visits to Canada by Province or Region, 1999



Source: International Travel Survey, 1999.

Text Table 3.11

Distribution of International Travellers to Canada by Province and Region Visited, 1999

	Total	United States	Other Countries
		%	
Province/Region Visited	100	100	100
Atlantic Region	7	7	7
Quebec	15	13	18
Ontario	44	47	33
Manitoba & Saskatchewan	3	3	3
Alberta	8	6	14
British Columbia	22	22	24

Source: International Travel Survey, 1999.

American Market to Canada Older than Overseas Market

As shown by *Text Table 3.12*, the largest demographic group for both the overseas and American travellers is the 45 to 54 age group. However, when comparing American and overseas travellers by age group, seniors make up a greater share of the American travel market to Canada compared to the overseas market: 13% versus 8% respectively.

Text Table 3.12

Distribution of International Travellers to Canada by Age, 1999

	Total	United States	Other Countries
		%	
Total All Ages	100	100	100
Under 15	7	7	6
15-24	6	5	8
25-34	11	10	16
35-44	15	15	16
45-54	18	18	17
55-64	14	14	13
65 and over	12	13	8

Source: International Travel Survey, 1999.

Younger travellers aged 25 to 34 represented a 16% share of overseas travellers to Canada compared to just 10% of American travellers.

Note

- ¹ The International Travel Survey has been in existence since 1972.

Canada's Travel Account Since 1980¹

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Introduction

Canada's travel account measures the difference between income from visitors travelling in Canada and spending by Canadian residents travelling abroad. It is therefore misleading to view Canada's persistent travel account deficits as an indication of poor performance by the tourism industry. In fact, Canada's travel account deficits provide clear evidence of the country's steady economic growth, social progress as well as high standard of living. Annual fluctuations are still worth watching, however, as indicators of the impact of marketing programs to grow inbound tourism and reduce outbound tourism to the United States and changes in economic conditions.

This article examines the nature and magnitude of Canada's travel account deficit since 1980. Trends and issues relating to Canada's travel account are examined, followed by a discussion of Canada's travel account with the United States and with all other overseas markets. The final section provides a conclusion and outlook.

Travel Receipts

Looking back, the growth in international travel receipts fluctuated noticeably in the first half of the 1980s (*Text Table 3.13*). Between 1981 and 1985, travel receipts rose by an average annual rate of almost 9.9%. Factors which may have contributed to the increase were generally favourable global economic conditions, lower gasoline costs in Canada and a stronger U.S. dollar relative to the Canadian dollar. In 1986, travel receipts surged by 24% to almost \$6 billion, reflecting Expo 86 in Vancouver, a very strong U.S. dollar and perhaps rising concerns over terrorism activity in Europe. After recording this exceptional growth, travel receipts declined in 1987, down 1.4%, but then recovered strongly in 1988 by 8.7%. In 1989, travel receipts totalled almost \$6.7 billion, a 6.2% increase over the previous year.

After posting solid growth (almost 11%) in 1990, Canada experienced slower growth in travel receipts in the next two years. Not surprisingly, this was attributed mostly to the 1991-1992 economic downturn, a strengthening Canadian dollar against the U.S. dollar and the Gulf War's dampening impact on international travel. This was followed by stronger growth in travel receipts during the 1993-1996 period, likely brought about by the combination of robust global economic growth, a stronger U.S. dollar, the Open Skies Agreement and the Canadian

marketing efforts associated with the creation of the Canadian Tourism Commission (CTC). Growth in travel receipts averaged an annual rate of nearly 10.5% during the four-year period.

In 1997, travel receipts increased some 4.0% only, mostly reflecting the Asian currency and financial crises and declines in German and French tourist arrivals. However, growth in Canada's travel receipts surged over 14% in 1998 from the year before, largely on the strength of larger numbers of Americans travelling north of the border. In 1999 and 2000, growth in travel receipts slowed to 8.1% and 5.2% respectively, partly due to the declining allure of a weaker loonie for American travellers, continued political and economic uncertainty in Asia, a weaker euro, worsening financial and economic volatility in Latin America and rising energy prices.

Travel Payments

Since 1968, when Canada recorded its last international travel account surplus, Canadians travelling abroad have consistently spent more than international travellers in Canada. In 1981 and 1982, Canada's travel payments expanded at modest rates of 5.5% and 3.8%, respectively. But, as *Text Table 3.13* illustrates, Canada's travel payments increased by a dramatic 22% in 1983, due in part to stronger economic growth in Canada and pent-up travel demand following the 1981-1982 economic recession. From 1984-1989, Canada's travel payments continued to grow solidly, with annual growth rates ranging from 6.1% to 17.1%.

In 1990, travel payments surged by almost 30% to just under \$13 billion, partly caused by a stronger Canadian dollar. However, growth in travel payments slowed dramatically to 7.8% in 1991, and the slowdown continued over the next

Text Table 3.13

Canada's Travel Account, 1980-2000 (\$ million)¹

Year	Travel receipts	% change over previous year	Travel payments	% change over previous year	Travel balance	GDP ²	Travel balance as a % of GDP ³
1980	2,971	-	3,851	-	-880	535,007	0.16
1981	3,391	14.1	4,062	5.5	-671	551,305	0.12
1982	3,471	2.4	4,218	3.8	-747	535,113	0.14
1983	3,714	7.0	5,146	22.0	-1,432	549,843	0.26
1984	4,218	13.6	5,507	7.0	-1,289	581,038	0.22
1985	4,733	12.2	6,040	9.7	-1,307	612,416	0.21
1986	5,867	24.0	6,410	6.1	-543	628,575	0.09
1987	5,787	-1.4	7,506	17.1	-1,719	654,360	0.26
1988	6,292	8.7	8,445	12.5	-2,153	686,176	0.31
1989	6,681	6.2	9,828	16.4	-3,147	703,577	0.45
1990	7,398	10.7	12,756	29.8	-5,358	705,464	0.76
1991	7,691	4.0	13,752	7.8	-6,061	692,247	0.88
1992	7,897	2.7	14,254	3.7	-6,357	698,544	0.91
1993	8,480	7.4	14,359	0.7	-5,879	714,583	0.82
1994	9,558	12.7	13,678	-4.7	-4,120	748,350	0.55
1995	10,818	13.2	14,072	2.9	-3,254	769,082	0.42
1996	11,748	8.6	15,332	9.0	-3,584	780,916	0.46
1997	12,221	4.0	15,873	3.5	-3,652	815,013	0.45
1998	13,985	14.4	15,955	0.5	-1,971	842,002	0.23
1999	15,115	8.1	16,870	5.7	-1,755	880,254	0.20
2000	15,898	5.2	18,030	6.9	-2,133	921,485	0.23

¹ All figures in Canadian dollars. In 1995, following directives from the International Monetary Fund, Statistics Canada revised the travel account to include spending of international visitors, crews as well as medical and education expenses but exclude international travel fares.

² GDP refers to real gross domestic product; data compiled from Bank of Canada, Bank of Canada Banking and Financial Statistics, March 2001, Ottawa, p. S96.

³ Absolute value; author's calculations.

Source: Statistics Canada, International Travel. Catalogue 66-201 and International Travel Account Spending Summary, various years.

two years. This was attributed mainly to the 1991-1992 economic recession and the Gulf War. Growth in travel payments declined in 1994, down 4.7% to around \$13.7 billion over 1993. Factors which may have contributed to this decline include the weakening of the Canadian dollar against the U.S. dollar, changes in medical coverage of Canadians outside the country and growing concerns over rising criminal activity against foreign tourists in Florida. That made the United States a slightly less popular international tourist destination for Canadian travellers. Growth in travel payments recovered modestly in 1995, rising 2.9% over 1994, and increased by 9.0% in 1996. Travel payments grew by 3.5% to almost \$15.9 billion in 1997 and by only 0.5% to nearly 16.0 billion in 1998.

Travel payments averaged an annual growth rate of almost 6.3% during the next two years and reached over \$18 billion in 2000, reflecting continued strong domestic economic growth, buoyant consumer confidence and a higher valued Canadian dollar relative to many European, Asian and Latin American currencies.

Travel Deficit

Text Table 3.13 shows that Canada's travel account has been in chronic deficit throughout the entire 1980-2000 period. However, the travel deficit remained under the one billion dollar mark during the first few years of the eighties. By 1983, Canada's travel deficit nearly doubled, reaching over \$1.4 billion, mostly due to a 22% jump in travel payments. During the next four years, the travel deficit fluctuated widely. This was clearly evidenced in 1986 as Canada's travel deficit dropped sharply by some 59% to \$543 million over the previous year. To a large extent, this reflected increased spending by international tourists in Canada during Expo 86 in Vancouver. In 1987, Canada's travel deficit soared by almost 217% to over \$1.7 billion from 1986, attributed mainly to the fall off after Expo 86.

Canada's travel account deficit continued to increase strongly during the late 1980s and early 1990s. Canada's travel account deficit, at almost \$6.4 billion, reached a record high in 1992, but then declined noticeably in each of the next three years.

In 1996 and 1997, the travel deficit rose by 10.1% and 1.9% to almost \$3.6 billion and nearly \$3.7 billion, respectively. Canada's travel account deficit plunged by over 46% to almost \$2 billion in 1998. In 1999, Canada recorded its lowest travel deficit, at over \$1.7 billion, in over a decade, partly due to the increased influx of travellers

from south of the border. In 2000, the travel deficit soared by almost 22% to more than \$2.1 billion, attributed largely to record spending by Canadian travellers in the United States despite the weak loonie.

U.S. Travel Receipts

During the 1980-2000 period, the United States remained Canada's major source of international travel receipts. With the exception of 1982, travel receipts from the United States grew strongly between 1981-1986, rising at an average annual rate of over 14% (*Text Table 3.14*). In 1987, travel receipts from the United States declined, partly due to the fall off after Expo 86, but then recovered slightly in 1988 and continued to grow thereafter at modest rates until 1993.

Travel receipts from the United States made double-digit gains during the 1993-1995 period, reflecting solid economic conditions south of the border and the strengthening of the American dollar against its Canadian counterpart. However, growth in travel receipts from the United States slowed to single-digit increases in the next two years. In 1998, travel receipts soared by over 25% to almost \$8.7 billion. This may be attributed to a number of factors, including continued strong economic growth and a booming stock market in the United States, the Open Skies Agreement, the appreciation of the U.S. dollar and the cumulative marketing efforts of Canada's tourism industry. In 1999 and 2000, growth in travel receipts from the United States slowed to 6.9% and 3.9% respectively, despite the ongoing weakness in the Canadian dollar.

The slowing U.S. economy, the international strength of the greenback and intensified competitive pressures suggest that Canada's tourism industry will need to continue to bolster efforts to maintain and increase its share of the large and very profitable U.S. outbound travel market.

U.S. Travel Payments

The United States was the main destination for Canadian outbound travellers during the 1980-2000 period. As *Text Table 3.14* shows, with the exception of 1983, growth in travel payments by Canadians travelling to the United States increased steadily during the first half of the 1980s. Canada's travel payments more than doubled from some \$4.1 billion in 1986 to over \$10.3 billion in 1991. For the first part of the 1990's, travel payments decreased steadily; changes in medical coverage in conjunction with growing concerns over crimes against international tourists in Florida in 1993 had a negative impact that lingered during 1994.

Text Table 3.14

Canada's Travel Account with the United States, 1980-2000 (\$ million)¹

Year	Travel receipts	% change over previous year	Travel payments	% change over previous year	Travel balance	Travel balance as a % of GDP ²
1980	1,977	-	2,625	-	-648	0.12
1981	2,294	16.0	2,863	9.1	-569	0.10
1982	2,267	-1.2	2,927	2.2	-660	0.12
1983	2,551	12.5	3,582	22.4	-1,031	0.19
1984	2,993	17.3	3,654	2.0	-661	0.11
1985	3,505	17.1	3,820	4.5	-315	0.05
1986	4,304	22.8	4,081	6.8	223	0.04
1987	3,977	-7.6	4,734	16.0	-757	0.12
1988	4,055	2.0	5,463	15.4	-1,408	0.21
1989	4,118	1.6	6,732	23.2	-2,614	0.37
1990	4,229	2.7	8,786	30.5	-4,557	0.65
1991	4,367	3.3	10,347	17.8	-5,980	0.86
1992	4,414	1.1	10,338	-0.1	-5,924	0.85
1993	4,878	10.5	10,068	-2.6	-5,190	0.73
1994	5,469	12.1	9,044	-10.2	-3,576	0.48
1995	6,027	10.2	9,144	1.1	-3,118	0.41
1996	6,489	7.7	10,062	10.0	-3,574	0.46
1997	6,921	6.7	10,280	2.2	-3,359	0.41
1998	8,659	25.1	9,896	-3.7	-1,237	0.15
1999	9,254	6.9	10,713	8.3	-1,459	0.17
2000	9,618	3.9	11,304	5.5	-1,686	0.18

¹ All figures in Canadian dollars. In 1995, following directives from the International Monetary Fund, Statistics Canada revised the travel account to include spending of international visitors, crews as well as medical and education expenses but exclude international travel fares.

² GDP refers to real gross domestic product; absolute value; author's calculations.

Source: Statistics Canada, International Travel. Catalogue 66-201 and International Travel Account Spending Summary, various years.

Travel payments recovered in 1995 and were up for the next two years. In 1998, spending by Canadian travellers south of the border dropped by 3.7%, when the Canadian dollar reached a record low value against the U.S. dollar, but rebounded surprisingly in 1999 and 2000 with increases of 8.3% and 5.5% respectively.

The United States will most likely remain the favourite international destination for Canadian leisure and business travellers given long-standing cultural ties, geographic proximity, warmer climate and greater economic integration.

Canada-U.S. Travel Deficit

Text Table 3.14 shows that Canada's travel account deficit with the United States was under \$1.0 billion between 1980-1987, with the exception of 1983. In 1986, Canada registered its only travel surplus with the United States (\$223 million) during the period under review. Expo 86 in Vancouver, terrorism in some European airports and fear

of radiation from the Chernobyl nuclear accident combined to make Canada an attractive, safe and clean vacation destination.

In 1987, Canada's travel balance with the United States quickly moved back into the red, to peak at almost \$6.0 billion in 1991. From 1992 to 1998, excluding 1996, the deficit began to narrow, reaching slightly more than \$1.2 billion in 1998, its lowest level in over a decade, but then widened in the following two years.

Since 1992, the reduction in Canada's travel account deficit with the United States was brought about by the combined effects of, among other things, a stronger valued U.S. dollar against the Canadian dollar, the emergence of numerous new international tourist destinations, easier and more affordable air travel and increased marketing efforts, including a new focused import-substitution based domestic marketing strategy.

All Other Countries' Travel Receipts

In the first half of the 1980s, the growth of travel receipts from countries other than the United States (or overseas countries) varied noticeably (*Text Table 3.15*). Despite the economic recession, travel receipts from overseas travellers to Canada rose at an average rate of 10.1% in both 1981 and 1982. In 1983, travel receipts dropped by 3.4% to approximately \$1.2 billion. This was partly brought about by the global economic and financial turmoil that followed the Mexican debt crisis of 1982. However, growth in travel receipts quickly recovered in 1984, up 5.3% over the year before, but then grew by a meagre 0.2% in 1985.

From 1986 to 1990, travel receipts from overseas travellers grew rapidly, at an average annual rate of over 21%. Much of this growth was fuelled by rising numbers of European and Asian tourists visiting Canada and the increasing importance of international business travellers associated with expanding world trade and investment and cheaper air travel. Growth in travel receipts slowed markedly during the 1991-1993 period, partly reflecting slower global

economic expansion, the Gulf War and the currency realignments that occurred in Europe in 1992. Travel receipts, however, increased rapidly by almost 14% in 1994 to around \$4.1 billion. This was followed by sharp increases in 1995 and 1996, over 17% and almost 10% respectively, reflecting generally favourable global economic conditions.² Travel receipts from overseas travellers edged up at an annual rate of less than 1.0% during 1997 and 1998. Growth in travel receipts, despite rising political, economic and financial uncertainty in many European, Asian and Latin American markets, expanded solidly in 1999 and 2000.

Looking forward, overseas markets will likely become increasingly important for the Canadian tourism industry. Nonetheless, it can be expected that the growth in the number of overseas travellers to Canada will most likely slow in the next two to three years given deepening and protracted political, economic and financial problems in Asia, a weaker euro, growing economic volatility in Latin America, ongoing exchange and interest rate volatility, stock market instability and higher energy prices.³

Text Table 3.15

Canada's Travel Account with All Other Countries, 1980-2000 (\$ million)¹

Year	Travel receipts	% change over previous year	Travel payments	% change over previous year	Travel balance	Travel balance as a % of GDP ²
1980	994	-	1,226	-	-232	0.04
1981	1,097	10.4	1,199	-2.2	-102	0.02
1982	1,204	9.8	1,291	7.7	-87	0.02
1983	1,163	-3.4	1,564	21.1	-401	0.07
1984	1,225	5.3	1,853	18.5	-628	0.11
1985	1,228	0.2	2,220	19.8	-992	0.16
1986	1,563	27.3	2,329	4.9	-766	0.12
1987	1,810	15.8	2,772	19.0	-962	0.15
1988	2,237	23.6	2,982	7.6	-745	0.11
1989	2,563	14.6	3,096	3.8	-533	0.08
1990	3,169	23.6	3,970	28.2	-801	0.11
1991	3,324	4.9	3,405	-14.2	-81	0.01
1992	3,483	4.8	3,916	15.0	-433	0.06
1993	3,601	3.4	4,291	9.6	-690	0.10
1994	4,089	13.6	4,634	8.0	-545	0.07
1995	4,791	17.2	4,928	6.3	-137	0.02
1996	5,259	9.7	5,269	6.9	-10	0.00
1997	5,300	0.8	5,593	6.1	-293	0.04
1998	5,325	0.5	6,059	8.3	-733	0.09
1999	5,861	10.1	6,157	1.6	-296	0.03
2000	6,280	7.1	6,726	9.2	-447	0.05

¹ All figures in Canadian dollars. In 1995, following directives from the International Monetary Fund, Statistics Canada revised the travel account to include spending of international visitors, crews as well as medical and education expenses but exclude international travel fares.

² GDP refers to real gross domestic product; absolute values; author's calculations.

Source: Statistics Canada, International Travel. Catalogue 66-201 and International Travel Account Spending Summary, various years.

All Other Countries' Travel Payments

After decreasing in 1981, travel payments by Canadian travellers to countries other than the United States (or overseas countries) grew strongly for nine straight years. *Text Table 3.15*, shows that travel payments increased from over \$1.2 billion in 1980 to almost \$4.0 billion in 1990, up 224%. The driving force behind this increase was the combination of generally healthy and stable domestic economic conditions, growing globalization and buoyant consumer confidence. In 1991, travel payments to overseas destinations dropped by over 14% to approximately \$3.4 billion. This sharp decline can be partly explained by the dampening effects of the Gulf War on international travel and the economic recession.

In 1992, growth in travel payments quickly rebounded, up 15% to over \$3.9 billion, but decelerated in the next three years, picked up slightly in 1996 and decelerated one again in 1997. In 1998 and 1999, travel payments grew by 8.3% and 1.6% to almost \$6.1 billion and about \$6.2 billion, respectively. In 2000, travel payments to overseas destinations increased 9.2% to over \$6.7 billion from the year before.

Canada-All Other Countries' Travel Deficit

Text Table 3.15 also shows that Canada's travel deficit with non-U.S. countries fluctuated widely during the 1980-2000 period. However, this deficit never surpassed the \$1 billion mark during this period. Canada's non-U.S. travel deficit peaked in 1985, reaching \$992 million. Weaker economic growth in the eurozone countries and rising concerns over foot-and-mouth disease could negatively affect inbound and outbound travel flows between Europe and Canada in the near term.

Conclusion and Outlook

Canada's travel account deficit has decreased significantly since its peak in the early nineties. Even with the prospect of a slowing economy, the United States will remain Canada's major source market and the most popular international destination for Canadian travellers. The numbers of non-U.S. residents travelling to Canada may be adversely affected by potential factors such as the deepening and protracted economic and financial problems in Asia, a weaker euro, increased health-related concerns, growing economic volatility in Latin America, continued foreign exchange and interest rate instability, wild stock

market swings and higher energy prices in the next two to three years. Keeping and attracting new international travellers from these regions will get tougher, suggesting continued concerted marketing efforts by Canada's tourism industry in making international travellers aware of the country's four season tourism products.

In the longer term, the ageing of the populations in Canada's major markets will become an increasingly important factor in influencing the direction, rate and magnitude of its travel account deficit.⁴

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Notes

- ¹ This article is an updated and modified version of a paper entitled "The Evolution of Canada's Travel Account, 1980-1998", *Journal of Travel Research*, Volume 39, Number 3, February 2001, pp. 285-291, co-authored by Nicolino Strizzi, Gerald Bailie and Anne-Marie Hince. Nicolino Strizzi is a Research Analyst, Research, Canadian Tourism Commission (CTC) in Ottawa, Canada. As usual, the views, and remaining errors, expressed in this article are the sole responsibility of the author and do not necessarily reflect those of the CTC, the CTC's Marketing Programs or any institutions with which he is associated.
- ² For an analysis of the trends and developments of tourism destinations in the Latin America and Caribbean Region, see (Strizzi and Meis 1998).
- ³ For a discussion of the economic and banking problems in Asia, see (Strizzi et. al., 1999). See also (Strizzi and Meis 1998).
- ⁴ For an examination of the impact of the ageing baby boomers on domestic travel trends in Canada see, (McDougall 1998).

CHAPTER 4

PASSENGER TRANSPORTATION IN CANADA

*Danielle Shaienks,
Tourism Statistics Program*

In 1999, travel expenditures in Canada totalled \$50.1 billion, of which \$20.1 billion or 40% was transportation-related. Canadians and foreigners travel billions of kilometres per year in Canada—by air, train or boat or in road vehicles, including private passenger vehicles as well as urban buses and intercity motor coaches providing scheduled or charter services (*Figure 4.1*).

Vast distances, dependence on trade and low population density (compared to the United States and Europe) make transportation vitally important to Canada. In 1999, the transportation industry accounted for 4.1% of GDP. Transportation continued to grow faster than the economy as a whole in 1999, as in the previous five years. Passenger transportation, for its part, grew substantially in 1999; however, for all modes (air, urban transit, bus, boat, rail), it grew slower than the GDP.

Influences on Demand and Supply of Passenger Transportation Services

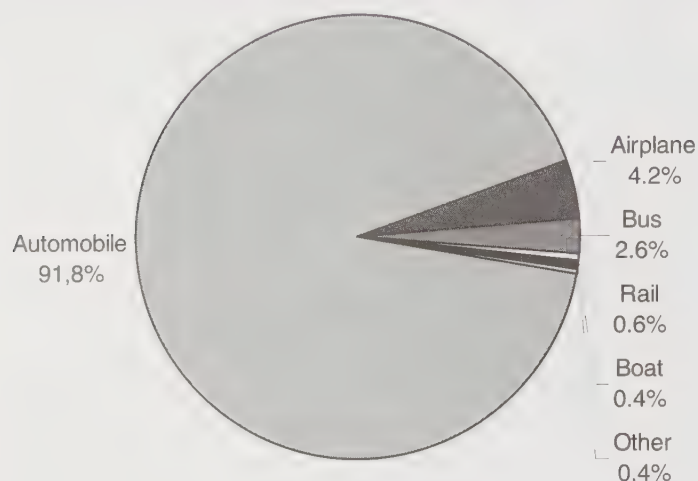
Over the years, there have been many influences on the demand for and supply of passenger transportation services in Canada. These factors include government policy, economic conditions, demographic and social trends and technology.

During 1999, for example, American tourists flocked to Canada in record numbers because of the good performance of the American economy as well as an advantageous Canadian-U.S. dollar exchange rate, while the number of Canadian travellers to the United States on overnight trips was at a ten-year low.

In the longer term, several factors combined during the 1990's to produce a significant increase in traffic between Canada and the United States. These included the North American Free Trade Agreement Implementation Act, an improving Canadian and American economy, the introduction of the 50-passenger Regional Jet¹ and the United States-Canada "Open Skies" agreement.

The latter agreement allowed both American and Canadian air carriers easier access to the other country. It encouraged a number of airlines to provide

Figure 4.1
Mode Choice – Domestic Travel in Canada, 1999



Source: Canadian Travel Survey.

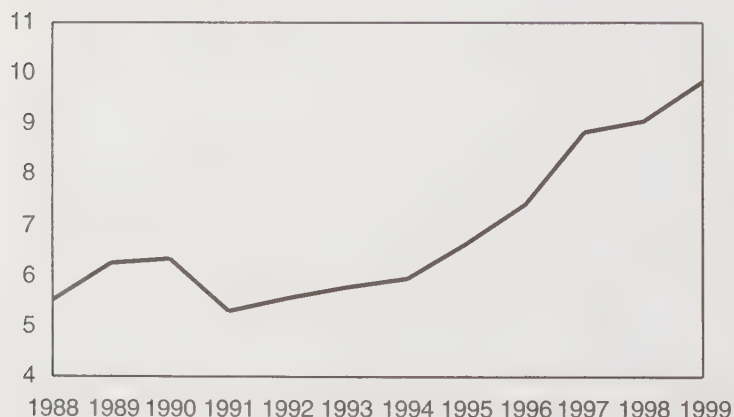
direct flights between certain Canadian and United States cities where previously there had been no direct flights (Figure 4.2). Although some of these direct connections have since been terminated, many new routes have been established.²

The Car is King

The roadway system that exists in Canada, coupled with a high standard of living compared to other countries, means that Canadians can afford to buy and drive their cars. The automobile is now the main mode of transport in Canada

Figure 4.2
Total Number of Transborder Passengers Carried by Canadian Air Carriers (Scheduled and Charter Services)

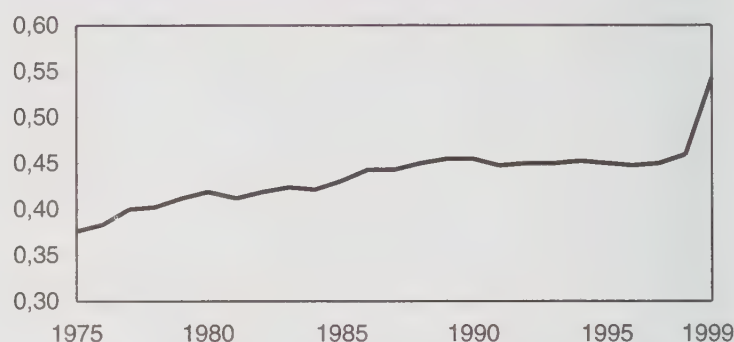
Millions of enplaned passengers



Source: Statistics Canada, Canadian Civil Aviation, Catalogue 51-206.

(certainly the least expensive), unlike in the first half of the last century when the train was the most practical way to travel long distances. Not only did automobile registrations increase by approximately 3.8% per year from 1975 to 2000, but the number of passenger cars registered per capita rose from .38 in 1975 to .54 in 1999³ (Figure 4.3). The strength of the economy, demographics and other economic factors have stimulated the growth of the automobile as a mode of personal transportation.

Figure 4.3
Passenger Automobile Registrations Per Capita



* Since 1999, passenger automobiles include all vehicles under 4,500 kg.

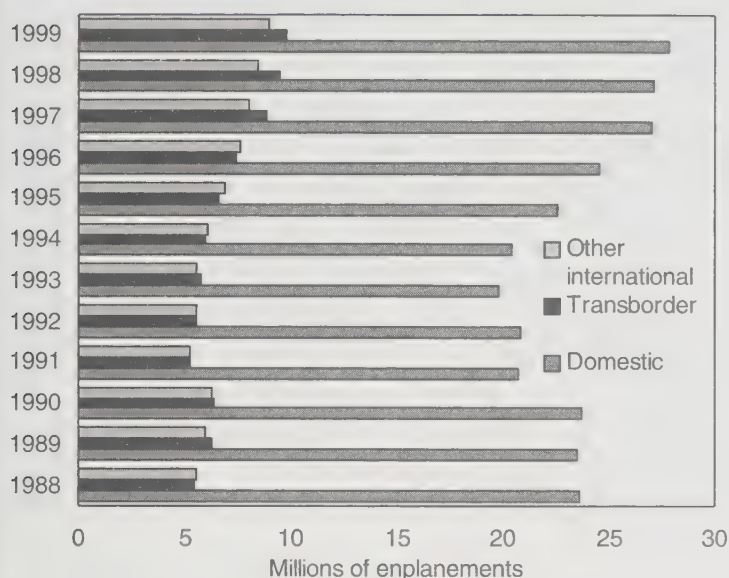
Source: Statistics Canada, CANSIM Matrix M356, D462104, M6367 and C892268. Statistics Canada - Road Motor Vehicles Survey.

To examine the growing importance of road vehicles in Canada, a new survey has been launched at Statistics Canada. The *Canadian Vehicle Survey* collects data on the number of vehicles circulating in Canada and the distances that they travel, along with information on passengers, trip purposes and the type of fuel used. According to initial results for the last quarter of 1999, vehicles with a gross weight of less than 4,500 kg travelled an average of 4,300 kilometres between October 1 and December 31, 1999, for a total of more than 71 billion kilometres. During that quarter, this type of vehicle accounted for 90.5% of the kilometres travelled by all vehicles in Canada.

Air Travel

Since 1994, domestic passenger traffic has grown for five years in a row. The number of passengers carried by the Canadian airline industry declined in the early 1990s, but since the mid-1990s has again begun to increase (Figure 4.4).

Figure 4.4
Total Number of Passengers Carried by Canadian Air Carriers (Scheduled and Charter)



Source: Canadian Civil Aviation, Catalogue 51-206.

In 1998 and 1999, domestic passenger traffic continued to expand, although at a slower pace than in 1996 and 1997. The increase was due to changes in service levels, with airlines introducing new scheduled services or increasing service to a number of cities in 1999.

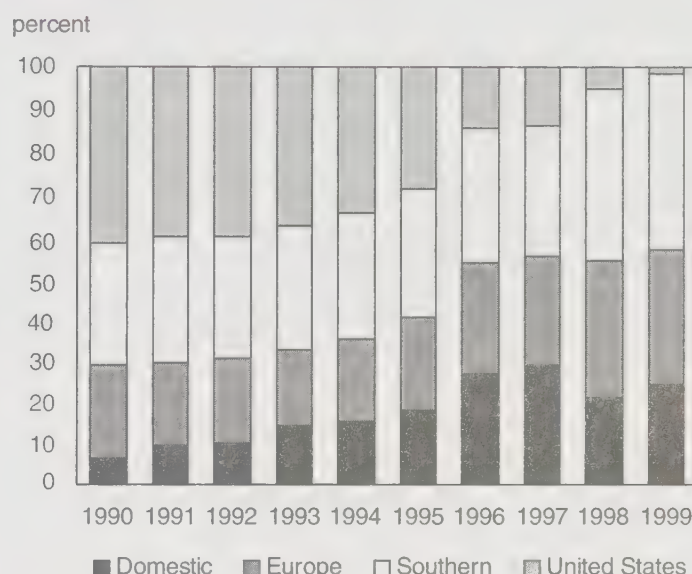
In the transborder market, Canadian carriers saw a major increase in the number of passengers since 1995 (68% between 1994 and 1999), to the point that in 1998, they carried slightly more passengers than the U.S. carriers whose traffic has grown by 26% since 1994.

The number of international passengers rose by 5.9% in 1998 and in 1999, with most of the increase coming from the Atlantic and Southern markets.⁴ The very strong increase in passenger traffic that Canada had experienced in the Pacific slowed down in 1998. However, even the small growth recorded in 1998 is a positive result, considering financial conditions in Asia. In 1999, the number of international travellers to the Pacific region bounced back and the total number of travellers increased by 4.4%.

Charter service has generally increased, with the domestic sector growing in importance. The United States region showed a 68.0% loss in charter services in 1999, owing to several carriers' ongoing conversion of some transborder charter services into scheduled services. Europe saw a 1.3% increase in Canadian passengers taking charter

flights, while the Southern region reported a 7.4% increase in traffic, the most popular destinations being Mexico, the Dominican Republic, Cuba and the Netherlands Antilles (Figure 4.5).

Figure 4.5
Air Charter - Choice of Destination



Source: Statistics Canada, Air Charter Statistics, Catalogue 51-207.

Marine Transportation

Island provinces, countless rivers and lengthy coastlines have resulted in a need for marine transportation in Canada. Although bridges have replaced many ferry services across the country, Canada's ferry services are still an important means of transport for passengers and vehicles alike. Ferry services vary widely in terms of ownership (from small, private operators to provincial or federal government agencies), vessel types (small cable vessels and water taxis to large fast ferries) and operations (seasonal to year-round schedules). In addition to local and interprovincial trade and transportation, the ferry and marine passenger services support tourism with whale-watching on both coasts, island hopping in the St. Lawrence Seaway, and sightseeing such as the famous *Maid of the Mist* service at Niagara Falls.

Cruise ship sector

In 1999, the Port of Vancouver recorded its seventeenth consecutive year of growth in cruise ship traffic. The Port of Halifax also had the best year in its history, doubling the number of passengers handled in 1998. Overall, traffic was

Text Table 4.1

Number of Aviation Charter Origin-Destination Passengers

Year	Canada	Europe	Southern ⁴	United States	Total ⁵
1990	329,199	1,211,055	1,569,719	2,282,290	5,394,314
1991	439,026	58,254	1,429,724	1,952,077	4,779,597
1992	527,352	1,055,084	1,539,528	2,125,925	5,252,517
1993	788,912	1,011,395	1,660,881	2,117,587	5,586,146
1994	899,817	1,194,897	1,781,268	2,084,556	5,964,404
1995	1,091,109	1,366,481	1,867,627	1,797,312	6,123,964
1996	1,497,939	1,493,728	1,848,620	811,513	5,653,574
1997	1,869,329	1,718,992	2,034,436	937,784	6,570,752
1998	1,110,111	1,783,361	2,215,192	269,613	5,378,277
1999	1,353,244	1,805,855	2,378,740	86,259	5,624,098
Growth Rate					
1990-99	%	311	49	-96	4

Source: Statistics Canada, Air Charter Statistics Catalogue 51-207.

up in the Atlantic ports. The Cruise Ship Authority of Newfoundland and Labrador reported a record year for cruise ship traffic. A great number of international cruise ships also called at Prince Edward Island.

This surge in the cruise ship sector on the Atlantic may be explained in part by the joint efforts of the Atlantic Canada Cruise Association and New Atlantic Frontier, a group of some 30 ports forming a loop extending from New York to Montreal that have pooled their commercial resources.

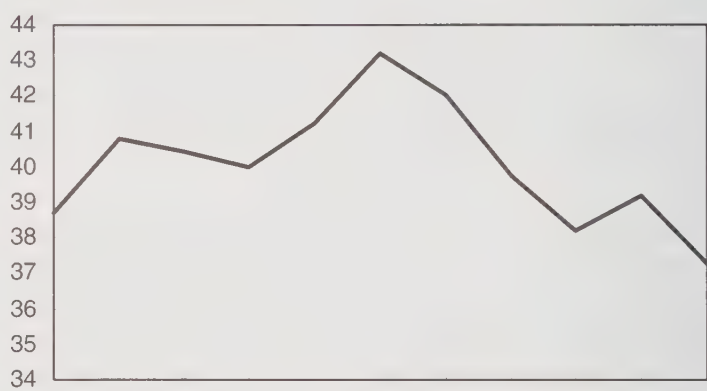
In 1999, the ports of Montreal and Quebec received fewer cruise ship visitors. The grounding of the *Norwegian Sky* in the St. Lawrence and its withdrawal from service for repairs reduced the number of calls that the vessel was able to make at Quebec.

Ferry Traffic

Ferries operate in most Canadian provinces. Fifteen of the largest ferry operators in Canada joined together in 1987 to form the Canadian Ferry Operators Association. The Association includes the transportation departments of five provinces, the two largest Crown corporations involved in ferry operations (British Columbia Ferry Corporation and Marine Atlantic Inc.) and several private operators. These fifteen organizations carried 39.2 million passengers and 15.3 million vehicles in 1999, employing more than 7,500 people (Figure 4.6).

Figure 4.6
Total Ferry Passengers

Millions of passengers



Source: Annual Report, Canadian Ferry Operators Association.

According to the 1999 Annual Report of the Canadian Ferry Operators Association, ferries in the province of British Columbia carried 71.9% of all passengers in 1999, followed by those in Quebec (13.9%) and Ontario (6.1%). Ferries in Atlantic Canada carried 7.1% of the passengers, including many passengers moving interprovincially between Nova Scotia and Newfoundland and between Nova Scotia and Prince Edward Island. The remaining passengers (1%) were transported by ferries in Manitoba and the Northwest Territories.

Recent years have seen a number of changes in Canada's passenger ferry industry. The federal government's role in the industry has been reduced as federal subsidies have declined and coastal services, such as in Newfoundland and the Bay of Fundy, New Brunswick, have been transferred to provincial governments or privatised. Perhaps the largest impact on ferry operations occurred with the May 1997 opening of the Confederation Bridge between New Brunswick and Prince Edward Island.

Passenger Train Service

At one time, passenger rail service in Canada was the primary means of intercity travel. Since the 1960s, however, the automobile and airplane have replaced the passenger train for many intercity travellers. For a country like Canada, with its low population density and vast geographic area, passenger rail is relatively expensive.

Passenger rail traffic decreased in 1998 to 4.0 million passengers from 4.1 million the previous year. The number of passenger-kilometres, which was 1.51 billion in 1997, followed the same trend, declining to 1.46 billion. VIA Rail carried by far the greatest amount of passenger traffic, and 85% of the passengers travelled on the Quebec-Windsor corridor. Transcontinental service from the East carried a few more passengers than service from the West. The four Class II carriers transported just under 335,000 passengers.

Canadian entrepreneurs operate a number of sightseeing trains in Canada, using, for example, steam locomotives and historical passenger cars. These services are popular with tourists, especially in the summer.

Intercity Bus Service

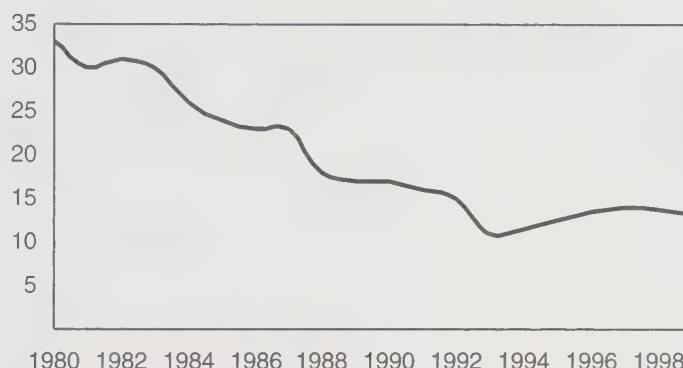
The number of travellers using scheduled intercity bus services in Canada has been steadily declining since the late 1970s, bottoming out at 10.8 million in 1993. In recent years, ridership has stabilized at between 13.5 and 14 million per year (*Figure 4.7*).

Charter bus services are closely linked to tourism, and they have been growing in all regions of Canada. Revenues from charter bus services are now greater than for scheduled services. The increase in these revenues has been matched by an increase in the size of the related vehicle fleet.

Figure 4.7

Number of Passengers - Urban Transit Bus Services

Millions of passengers



Source: Statistics Canada, *Passenger Bus and Urban Transit Statistics, Catalogue 53-215*.

Conclusion

Canada's vast distances and the strength of its economy have given rise to a multimodal passenger transportation system which, despite low population density, harsh winters and a varied landscape, is one of the best in the world. Transportation is, and surely always will be, vital to the health, safety and wealth of the nation and its people.

Notes

- ¹ Bombardier's Regional Jet allowed airlines to introduce economical and profitable jet service on low-density passenger routes.
- ² For more information, see "Success of New Non-Stop Services in the Aviation Transborder Market," Lund and Kohn, Proceedings of the 33rd Annual Conference of the Canadian Transportation Research Forum, May 1998.
- ³ In 1999, the definition of passenger cars was changed to include all vehicles with a gross weight of less than 4,500 kg. Now, this category of vehicles includes vans, little trucks. This change led to an increase in the number of vehicles reported in this category. Passenger car registrations increased by approximately 2.2% per year from 1975 to 1998, and the number of cars per capita was .46 in 1998. *Figure 4.3* shows the data for 1991 to 2000.
- ⁴ Southern includes the Caribbean and other southern destinations.
- ⁵ Total shown includes passengers travelling to Africa, Asia and Pacific. These destinations account for less than one-half of one percent of charter passengers and are not shown separately in *Text Table 4.1*.

The “Open Skies” Agreement, a New Start for the Transborder Flights?

Jimmy Ruel
Tourism Statistics Program

The number of passengers on transborder flights between Canada and the United States has increased significantly since 1995. The 1995 base year coincides with the signing of the Open Skies Agreement, which opened up air travel markets between these two countries. The agreement has resulted in substantial changes to air travel in North America.

With the exception of the Vancouver, Montreal and Toronto markets, the agreement immediately eliminated restrictions on servicing air travel markets. Before 1995, the number of carriers and transborder flights was restricted on both sides of the North American border. In the case of Vancouver and Montreal, new services were limited until February 1997. Restrictions applicable to Toronto were lifted in February 1998.

In this context, it would be relevant to examine the geographic breakdown of changes in passenger numbers from 1995 to 1998 and to compare the breakdown with that of previous years, i.e., 1993 to 1995 (*Figure 4.8*). The assumption of this analysis is that the agreement to open up markets not only coincided with an increase in the number of transborder passengers, but also with a change in market breakdown. This change would result in a more substantial increase for less-frequented markets than for well-established major markets.

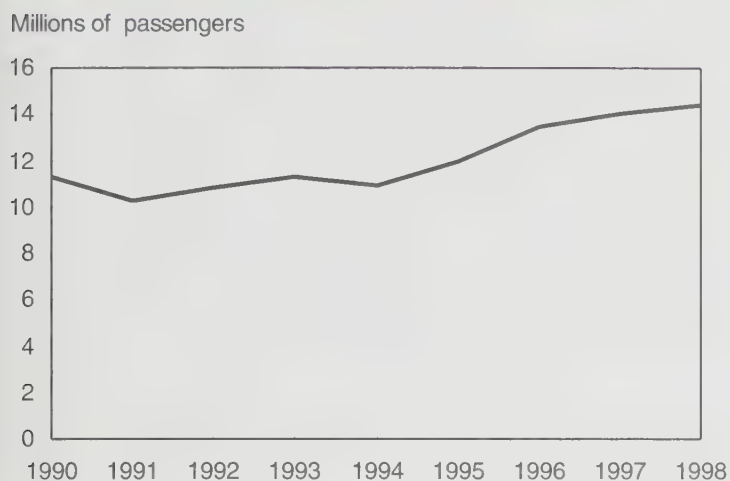
Several issues underlying the main assumption are also addressed in this article. For example, which market experienced the greatest increase? Is this potential market diversification observable in all Canadian provinces and territories? If transborder markets became more diversified, would Canada's largest cities be able to maintain their market shares?

Substantial Growth for Less-frequented Transborder Markets Since 1995

An analysis of the changes in markets classified by size in 1993 reveals the type of market that experienced the most significant increase in passenger numbers since the signing of the Open Skies Agreement (*Text Table 4.2*).

Thus, markets of less than 25,000 passengers per year in 1993 increased substantially more than major markets after 1995. In 1997, the number of passengers travelling in small markets exceeded the number of those transiting in major markets. Carriers appear to have concentrated on supplying services to small markets after the Open Skies Agreement, while markets of over 100,000

Figure 4.8
Change in the Number of Canada-U.S. Air Passengers

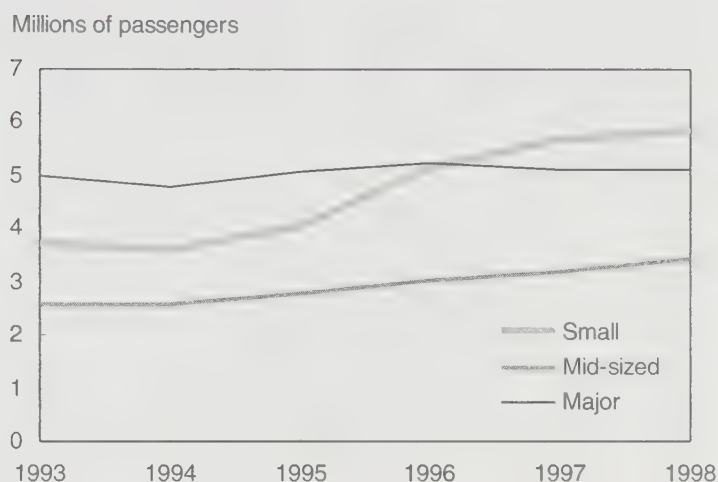


Sources: Air Passenger Origin and Destination Survey and Charter On-Flight Origin and Destination Survey.

passengers per year in 1993 increased by only about 1.5% per year since 1995. During that time, small markets grew an average of 15.7% per year while mid-sized markets grew an average of 8.5% per year (Figure 4.9).

The breakdown of growth in passenger numbers can certainly be explained by the greater freedom of carriers to choose which transborder markets they serve, but also by regional jet use. Restrictions prior to 1995 forced carriers to limit the number of markets they served. It can therefore be supposed that certain markets, which may have been profitable, were abandoned for others with greater potential. It is worth noting, however, that markets which failed to maintain a satisfactory seat occupancy rate before the arrival

Figure 4.9
Number of Transborder Passengers by Market Size
(Analysis of 1993 markets)



Sources: Air Passenger Origin and Destination Survey and Charter On-Flight Origin and Destination Survey.

of regional jets now successfully receive regular service.¹ The freedom of carriers must also be understood in a context where not all markets require the same occupancy rate. Business seats are more lucrative than seats for "leisure" travel.²

These reasons may explain why carriers are offering more service to markets that previously seemed inaccessible. Figure 4.9 shows the effect of these choices on the number of enplaned persons in less-frequented markets since 1995. The fact that passenger numbers for markets of over 100,000 passengers have not risen similarly may suggest these markets were already receiving optimum service and had been priority markets for the carriers before the agreement.

Text Table 4.2

Transborder Passengers by Market Size from 1993 to 1998 (Analysis of Markets Classified by Size in 1993)

Type of market	1993		1994		1995		1996		1997		1998		Change from 1995 to 1998
	thousands	%	thousands	%	thousands	%	thousands	%	thousands	%	thousands	%	%
Small	3,714	33	3,597	33	4,050	34	5,175	39	5,686	41	5,848	41	63
Mid-sized	2,571	23	2,563	23	2,783	23	3,048	23	3,210	23	3,428	24	34
Major	4,988	44	4,808	44	5,093	43	5,225	39	5,110	37	5,105	36	6
Total	11,273	100	10,968	100	11,927	100	13,448	100	14,005	100	14,381	100	31

Sources: Air Passenger Origin and Destination Survey and Charter On-Flight Origin and Destination Survey.

Methodology

Source of Data

For the purpose of this article, data was drawn from the Air Passenger Origin and Destination Survey. The survey collected the number of passengers for each city-pair. This information is necessary for aggregation by market size for analysis purposes and for the breakdown of markets into geographical areas. The same method was used for air charter statistics, which were added to those from the Air Passenger Origin and Destination Survey for an overall picture of transborder air traffic. In order to obtain a complete picture of the origins and destinations of passengers travelling between Canada and the United States, it is necessary to include data from the United States Passenger Origin-Destination Survey. These data are collected by the Department of Transportation. Canada and the United States exchange passenger origin and destination data quarterly through a formal statistical exchange agreement.

Before the Open Skies Agreement was signed, a number of carriers offered charter flights to avoid scheduled service restrictions. Thus, after the agreement, the number of enplaned passengers dropped for charter flights but rose for scheduled services. However, air travel restructuring only partially explains the substantial increase in the number of enplaned passengers on scheduled flights since 1995. The number of transborder passengers on charter flights decreased by 1.8 million between 1994 and 1998, while the total number of transborder passengers on scheduled flights grew by 5.2 million over the same period. In 1998, charter travel represented only 1.9% of air travel between Canada and the United States.

Variables Examined

The two main variables of this analysis are the number of enplaned passengers on scheduled and charter flights, and the markets where they were enplaned. A market consists of a trip's origin and destination (for example: Montreal-New York). Market sizes are as follows: Major markets: over 100,000 passengers per year Mid-sized markets: from 25,000 to 99,999 passengers per year Small markets: less than 25,000 passengers per year

Limitations

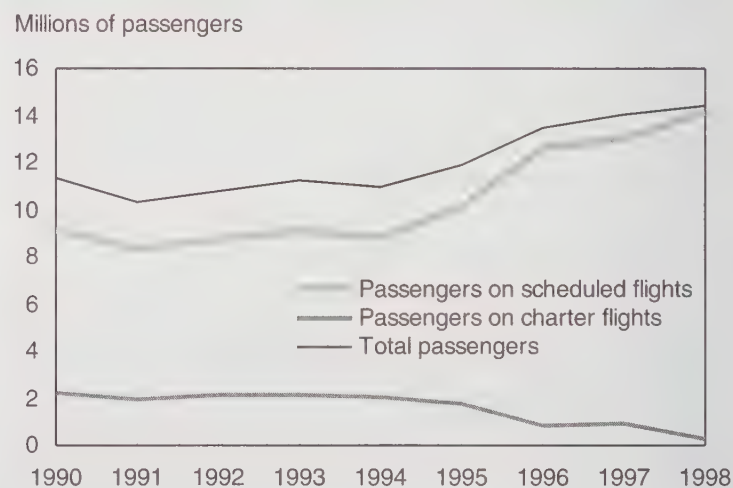
Markets served by carriers which provide scheduled service to less than 300,000 passengers are not included in the survey coverage. However, these carriers will be represented to a certain extent due to connecting flights between their lines and those of participating carriers.

New Markets, Particularly in Western Canada

A breakdown of new markets by province reveals that only a small percentage of markets introduced after 1995 were offered in the more highly-populated provinces (*Text Table 4.3*). In terms of transborder air markets, Québec and Ontario were probably already receiving a level of service in 1995 that did not justify additional markets to the United States. British Columbia and Alberta received almost half of all new markets, with a substantial percentage of these going to British Columbia. On the whole, British Columbia was the preferred province for carriers adding new markets after the "Open Skies Agreement."

Conversely, Manitoba is the only province where the number of markets decreased from 1995. This can be explained, in particular, by the conversion of a number of charter flights to scheduled flights after the Open Skies Agreement. Before the signing of the agreement, some carriers offered charter flights to avoid restrictions applied to scheduled flights. After the agreement, the number of chartered passengers decreased for the benefit of scheduled flights (*Figure 4.10*). A significant portion of Winnipeg's air traffic consisted of charters.³

Figure 4.10
Number of Transborder Passengers from 1990 to 1998



Sources: Air Passenger Origin and Destination Survey and Charter On-Flight Origin and Destination Survey.

Text Table 4.3

Number of Transborder Air Markets by Province and Territory

	1993	1994	1995	1996	1997	1998	Change in % from 1995 to 1998
British Columbia	1,272	1,221	1,281	1,409	1,642	1,579	29.3
Alberta	793	743	807	895	971	940	26.5
Saskatchewan	293	272	344	389	394	420	54.4
Manitoba	317	327	301	332	384	322	-1.5
Ontario	1,550	1,580	1,663	1,765	1,769	1,739	10.1
Québec	849	816	863	907	898	889	8.9
New Brunswick	389	353	391	406	406	355	0.5
Nova Scotia	262	269	306	309	308	339	26.0
Newfoundland	257	266	298	358	344	325	22.2
Prince Edward Island	104	86	81	84	78	90	4.7
Yukon	62	54	61	58	94	93	72.2
Northwest Territories	75	59	58	94	147	123	108.5
Nunavut	27	21	34	30	42	44	109.5
Total	6,250	6,067	6,488	7,036	7,477	7,258	19.6

Sources: Air Passenger Origin and Destination Survey and Charter On-Flight Origin and Destination Survey.

Some Atlantic provinces received a substantial number of the new transborder markets. More specifically, Nova Scotia and Newfoundland received the new markets in the region while New Brunswick and Prince Edward Island maintained their level of service in terms of the number of markets. In these provinces, the level of service prior to the agreement was considered adequate.

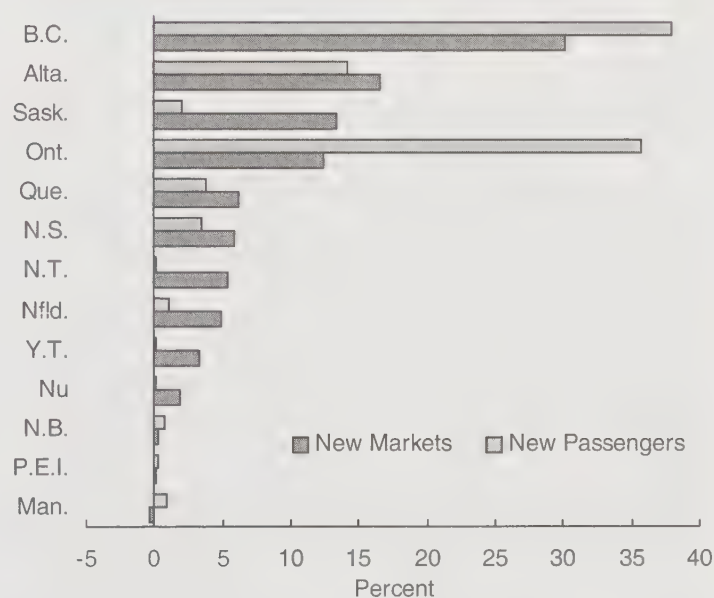
More Passengers, Mainly in British Columbia and Ontario

Furthermore, growth in passenger numbers was not consistent throughout the country (Figure 4.11). Although Ontario failed to receive a number of new markets proportional to its population, for example, passenger numbers for the province increased significantly from 1995 to 1998.

This may have had an effect, particularly with respect to flight frequency and the introduction of non-stop flights. For example, passenger numbers rose substantially for the Ottawa-Washington, Toronto-Cincinnati and Ottawa-Boston markets when non-stop flights were introduced. The level of service thus increased, as did the number of carriers in these markets. These are mid-sized markets, an area in which Ontario experienced marked air travel growth since the Open Skies Agreement.

Figure 4.11

Breakdown of Growth in the Number of Passengers and Transborder Markets from 1994 to 1998



Sources: Air Passenger Origin and Destination Survey and Charter On-Flight Origin and Destination Survey.

In Québec, the major markets in 1993 experienced a drop in passenger numbers after the Open Skies Agreement was signed. Québec's share in the growth of transborder air travel was small (*Figure 4.11*), considering its percentage of the Canadian population. The province experienced more growth in small markets (less than 25,000 passengers per year).

Proportionately, growth was stronger in Alberta and stronger yet in British Columbia. These provinces not only won a substantial share of the new markets, but also a greater number of transborder passengers. This growth is observable in British Columbia's small markets, but particularly in markets of over 100,000 enplaned passengers per year in 1993. In fact, these markets grew by 92.9% between 1995 and 1998. For example, in 1998, the Vancouver-San Francisco and Vancouver-Los Angeles markets saw the greatest increase in passenger numbers for Canadian and U.S. markets.

Growth in Each Region...

Text Table 4.4 shows that the Canadian territories and Atlantic provinces experienced a significant increase in the number of transborder passengers after the agreement was signed, even if such an increase is hardly perceptible for Canada as a whole. Elsewhere in the country, British Columbia recorded the strongest growth in the number of

passengers travelling between Canada and the United States since 1995.

Positive Effects for Vancouver, Calgary, Ottawa and Halifax

Growth in Canadian air travel usually occurs in the largest cities. In 1996, Vancouver exceeded Montreal for the first time in terms of the number of enplaned air passengers travelling between Canada and the United States (*Figure 4.12*). This change is due to the substantial increases recorded in British Columbia, but also to Québec's poor growth in passenger numbers compared to other provinces.

Toronto's market share has been affected by a stagnation in passenger numbers for Ontario markets of over 100,000 passengers (1993 markets). Before the agreement, the Toronto market represented 42.9% of all Canada-United States travel, versus 38.6% in 1998. Furthermore, substantial growth in Ontario's mid-sized markets appears to favour Ottawa, whose market share rose from 3.1% in 1994 to 4.5% in 1998. Halifax has benefited from an increase in passenger numbers for Nova Scotia's small transborder markets since the Open Skies Agreement (*Text Table 4.5*).

Overall, since 1995, passenger numbers have grown primarily in Canada's eight most-frequented cities. Other cities recorded 9.2% of transborder air traffic in 1994 versus only 7.6% in 1998.

Text Table 4.4

Number of Transborder Air Passengers by Province and Territory

	1993	1994	1995	1996	1997	1998	Change in % from 1995 to 1998
	thousands						
British Columbia	1,656.1	1,673.2	2,038.5	2,429.9	2,688.8	2,966.5	77.3
Alberta	1,261.9	1,247.3	1,344.1	1,513.3	1,661.8	1,729.1	38.6
Saskatchewan	125.3	117.9	132.8	207.1	229.6	184.7	56.6
Manitoba	329.9	330.3	313.9	350.9	361.5	360.7	9.2
Ontario	5,298.7	5,184.1	5,506.8	6,077.9	6,325.7	6,402.6	23.5
Québec	2,277.5	2,137.4	2,273.6	2,455.4	2,329.5	2,268.2	6.1
New Brunswick	62.9	43.8	49.4	64.3	58.1	67.8	54.8
Nova Scotia	181.8	171.2	196.6	249.0	245.5	289.2	68.9
Newfoundland	45.3	39.7	47.3	65.4	66.1	73.6	54.7
Prince Edward Island	19.4	14.1	20.5	19.1	19.1	22.1	85.5
Yukon ⁴	4.5	3.1	3.9	5.7	9.0	8.0	161.0
Northwest Territories ⁴	2.3	1.6	2.1	5.3	8.1	6.2	275.0
Nunavut ⁴	1.1	0.5	0.8	1.0	1.1	1.8	280.9
Total	11,266.8	10,964.2	11,924.6	13,445.8	14,003.9	14,380.3	31.2

Sources: Air Passenger Origin and Destination Survey and Charter On-Flight Origin and Destination Survey.

Text Table 4.5
Market Share of Transborder Travel for Canada's Eight Most-frequented Cities

	1993	1994	1995	1996	1997	1998
	%					
Toronto	42.58	42.85	41.40	39.43	39.35	38.56
Vancouver	13.16	13.75	15.73	16.51	17.15	18.34
Montreal	15.74	15.38	16.17	16.28	14.61	14.76
Calgary	7.00	7.38	7.42	7.76	8.08	8.25
Ottawa	3.10	3.15	3.52	4.35	4.43	4.50
Edmonton	4.10	3.91	3.77	3.39	3.61	3.59
Winnipeg	2.91	2.99	2.62	2.59	2.55	2.49
Halifax	1.48	1.45	1.53	1.73	1.67	1.91
Other	9.93	9.15	7.85	7.97	8.54	7.60

Sources: Air Passenger Origin and Destination Survey and Charter On-Flight Origin and Destination Survey.

Conclusion

The Open Skies Agreement eliminated airline industry restrictions between Canada and the United States. This has allowed carriers to offer more transborder services.^{5,6} Also, the improvement of the existing services has contributed to a substantial growth in markets of less than 25,000 passengers per year (1993 markets) since 1995. Several of these markets are now mid-sized and their number of passengers has increased dramatically since 1995. This suggests that more travellers are transiting in markets where more services are offered.

Major markets, on the other hand, experienced a more modest increase, as did Canada's two most highly-populated provinces, which benefited from the highest level of air travel services in 1995. Carriers appear to have identified opportunities in certain Atlantic provinces. Nova Scotia and Newfoundland received a significant percentage of new markets and their passenger numbers increased appreciably. Alberta also experienced growth, but British Columbia remains the province where the number of markets and passengers has risen most dramatically.

An analysis of the growth that coincided with the signing of the Open Skies Agreement reveals which markets and provinces have benefited most from the agreement. Changes in major transborder markets will have to be assessed once the Vancouver, Montreal and Toronto markets have been entirely opened up. The growth of markets introduced after the signing of the Open Skies Agreement will also need to be determined.

Notes

- ¹ LUND, Robert and GUDZ, Carol, *Characteristics of Nonstop Services in the Transborder (Canada-U.S.) Aviation Market (1994-1998)*. Aviation Statistics Centre, Transportation Division, Statistics Canada.
- ² HÉBERT, Roland, *The Changing Nature of Canada-United States Air Travel since the "Open Skies" Agreement.*, *Air Passenger Origin and Destination, Canada-United States Report*, Statistics Canada Catalogue No. 51-205-XIB, 1998, pp.19-27.
- ³ Some air carriers participating in the Charter On-Flight Origin and Destination Survey may have been excluded from survey coverage because they converted certain charter flights to scheduled flights without being required to report enplaned passengers to the Air Passenger Origin and Destination Survey.
- ⁴ Data for Canadian territories are more likely to present a change due to survey coverage, but also because estimates are more limited. Some fluctuations occur when a non-respondent small carrier transfers a market to another carrier that serves over 300,000 enplaned passengers per year and reports to the Air Passenger Origin and Destination Survey. Furthermore, including travellers with a small carrier on the itinerary of a respondent carrier may increase the number of passengers reported to the survey.
- ⁵ GENDRON, François, *The Canada-U.S. "Open Skies" Agreement: Are the Canadian Carriers Doing Well?*, Travel Log, Vol. 16 No. 2 1997, pp 1-8.
- ⁶ GENDRON, François and DUBEY, Sangita, *The U.S.-Canada "Open Skies" Agreement: Three years Later*, Travel Log, Vol. 18 No. 3 1999, pp 1-9.

CHAPTER 5

TOURISM SERVICE INDUSTRIES

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This chapter describes three specific industry sectors, all very important to tourism: traveller accommodation services, food services and drinking places, travel agencies and tour operators. These sectors generated just over half of the goods and services purchased by all visitors in Canada in 1999¹.

Traveller Accommodation Services Industries

Introduction

Traveller accommodation is an industry that supports Canada's tourism economy and is made up of three main categories: hotels and motor hotels, motels and other accommodation². This section presents a summary of the traveller accommodation industry for Canada in 1998 and is divided into two main parts. The first part provides a general overview of the financial results and a client profile for each of the three industry groups. The second part examines in more detail the hotel industry group, based on a surveyed panel of establishments.

Overview

Traveller accommodation generated \$11.3 billion in revenue in 1998, representing an increase of 5% over 1997³. Part of this growth can be explained by the strong economy across most of the country, favorable exchange rates for U.S. travellers visiting Canada, as well as increased popularity of Canadian tourism sites.

In 1998, hotels continued to dominate the industry, generating \$8.9 billion in revenue and accounting for close to 80% of total traveller accommodation revenue. As in the previous year, this group represented only one-third of all accommodation establishments. Motels, as in the year before, accounted for 10% of all the revenues while the other accommodation group generated the balance of the revenues for the industry. While this group continued to account for the largest number of all accommodation establishments (42%) they generated only 11% of the total revenues in 1998.

Text Table 5.1

Number of Establishments and Total Revenue, Traveller Accommodation Industries 1998

	Traveller Accom- modation Industries	Hotels	Motels	Other Accom- modation
Number of establishments	15,921	5,283	4,054	6,584
Distribution (%)	100	33	25	42
Total revenue (million \$)	11,278	8,904	1,129	1,245
Distribution (%)	100	79	10	11

Source: Annual Traveller Accommodation Survey.

Of the three accommodation groups, hotels and motor hotels have the greatest number of rooms and offer their guests the broadest range of facilities and services. Typical amenities include: dining lounges, conference rooms, swimming pools, shops and athletic facilities.

Room and guest accommodation revenue represented the main portion of total revenues for all three groups of accommodation (*Text Table 5.2*). Motels got 82% of their revenues from room accommodation while rooms accounted for just over half of hotel revenues. Meals generated the second largest share of revenues for hotels (17%) and motels (8%). The sales of alcoholic beverages accounted for the same share as meals for hotels.

Text Table 5.2

Distribution of Revenue Sources, Traveller Accommodation Industries, 1998

	Traveller Accom- modation Industries	Hotels	Motels	Other Accom- modation
		%		
Accommodation	60	56	82	75
Meals	15	17	8	3
Alcohol	14	17	4	1
Merchandise	1	1	2	7
Services	3	3	1	2
Other revenue	6	6	3	10
Total revenue*	100	100	100	100

* May not add due to rounding.

Source: Annual Traveller Accommodation Survey.

Source of Data:

Annual Survey of Traveller Accommodation - the establishment is the survey unit. Financial details are collected (revenues and operating expenses) as well as operating characteristics (number of rooms, occupation rate, facilities offered and marketing information).

Methodology:

Commencing with the 1998 survey year, the methodology is no longer a sample of large establishments. Rather, the new methodology is a random sample stratified by type of industry, province and revenue category, designed to achieve a balanced representation of establishments from across accommodation services (NAICS 721). While the larger establishments are included, smaller establishments are selected randomly. These sampled units are then weighted up to represent all the smaller units in the stratum.

The objective of the survey is to produce estimates for the whole industry. The portion of the population eligible for sampling was defined as all incorporated establishments with revenues greater than \$50,000. Incorporated firms with revenues below \$50,000 were excluded from direct data collection to reduce response burden. The contribution of these firms to the overall estimate is less than 10% and is accounted for in the final estimates through the use of administrative taxation records. Basic statistics can be obtained from tax data (total revenue, total expenses, depreciation, and wages and salaries and benefits).

The information source of businesses in Statistics Canada is called the Business Register (BR). It was utilized fully for the first time for the 1998 survey year. The impact of the change in methodology was minimal and any revisions to 1997 data reflected changes only to the industrial classification of some businesses brought about by newer information.

For brevity, the hotel and motor hotel group, which also includes resorts, will be referred to as "hotels".

Control of operating costs is a key to generating profits in the traveller accommodation industry. The most significant operating expense was salaries, wages and benefits, which accounted for 30% of total revenue. Hotels incurred proportionately more salary expense than motels and other types of accommodation (*Text Table 5.3*). Cost of goods sold and occupancy expenses were also major operating expense items, representing 20% to 27 % of revenues.

Text Table 5.4 shows that business clients made up the greatest share of customers staying at hotels, while leisure travellers were the majority of patrons in motels and other types of accommodation. Foreigners accounted for almost one-quarter of hotel guests overall.

Text Table 5.3

Operating Expenses as a Percentage of Total Revenue, Traveller Accommodation Industries, 1998

	Traveller Accom- modation Industries	Hotels	Motels	Other Accom- modation
(% of Total Revenue)				
Operating Expense by Source				
Cost of goods sold	14	15	7	8
Salaries, wages and benefits	30	30	27	27
Occupancy expenses	12	12	15	12
Repair and maintenance	4	4	5	6
Advertising	3	3	2	3
Depreciation	5	4	6	6
Interest Expense	1	1	4	1
Other	20	19	24	28
Total Expenses	88	88	86	90

Source: Annual Traveller Accommodation Survey.

Other accommodation industries include establishments that are usually smaller, with fewer rooms or units offered than hotels and motels. Almost 70% of the guests to these establishments were domestic clients staying for personal reasons and leisure. They also received a larger share of foreign clientele than either the hotels or motels.

The average Canadian hotel offered 127 rooms. Overall, large establishments fared better than their smaller counterparts, with an annual occupancy rate of 71% and a profit margin of 15%. Room revenues also accounted for a

Text Table 5.4

Client Base, Traveller Accommodation Industries, 1998

	Total Accom- modation Industries	Hotels	Motels	Other Accom- modation
%				
Domestic clients				
Individuals	36	32	47	69
Business	33	36	33	3
Government	7	8	5	1
Foreign clients	23	24	14	26
Total	100	100	100	100

Source: Annual Traveller Accommodation Survey.

Hotel and Motor Hotel Industry – A Closer Look

Coverage

This section profiles the hotel and motor hotel group based on a panel of businesses that fully completed their Annual Survey of Traveller Accommodation questionnaires for 1998. The panel is a representative subset of the sample of establishments. A total of 1,856 businesses made up the panel with hotels accounting for 833 or 45%.

Performance Measures

For hotels, the occupancy rate is a major indicator of the industry's performance in terms of capacity utilization. It is a calculation of the ratio of the number of rooms rented (occupied) divided by the number of rooms available. In other words, the occupancy rate is a measure of the demand for hotel rooms relative to their supply. Two other performance measures are the average daily rate and the revenue per available room. The average daily rate is the ratio of room sales to the number of rooms sold, which equals the average price of a hotel room. The revenue per available room is the ratio of room sales to the total number of rooms that are available. This variable can also be calculated by multiplying the occupancy rate to the average room rate. Thus, higher occupancy rates infer that hotels can generate more room revenues. Since most of the operating costs of a hotel are fixed, an increase in the occupancy rate usually translates into an increase in profits.

Size of establishment

In this report, the number of rooms offered by a hotel determines the size category of the establishment. Properties with less than 50 rooms are small, while those having between 50 and 199 rooms are medium-sized. Large hotels have 200 or more rooms. The larger hotels tend to offer a greater choice of services and facilities than smaller ones.

higher share of the total revenues for large hotels than they did for small or medium sized establishments. While small hotels derived one quarter of their revenues from room sales, the average large hotel reported 63% of their revenues from this source. Large establishments generally had a higher proportion of their expenses allocated to labour costs (32%) than did small establishments (25%) in 1998. In contrast, small hotels were more likely than the large hotels to have higher expense shares derived from the cost of goods sold, with 40% for small hotels compared to 10% for large hotels.

Hotels on average charged \$103 per night in 1998 and generated \$68 of revenue per available room (Text Table 5.5). There was a positive correlation between average daily rate and hotel size; large hotels (\$85) had higher

revenue per available room than did medium sized hotels (\$50) or small hotels (\$33). Relative to the previous year, large hotels experienced a decrease in labour costs (from 35% of expenses in 1997 to 32% in 1998), while their share of revenue from guest accommodation rose – from 61% to 63%. Small and medium sized establishments showed a positive correlation between rising labour costs and revenues.

In 1998, the occupancy rate for all hotels remained at 66%, and the profit margins, while still strong, dipped slightly to 14% from 15% in 1997. The share of profit margins decreased slightly as a result of expenses rising more or decreasing less than revenues — especially for the large and small-sized hotels.

Longer Term Trends

In general, hotels have reported increased occupancy rates, profits and average room rates since 1993. The demand for hotel rooms rose steadily for five years from an occupancy rate of 59% in 1993 to 66% in 1998. In 1993, hotels showed losses, then profits doubled in two consecutive years, growing to 15% in 1997. Contributing to this improved performance was the average price of hotel rooms which jumped dramatically (45%) over this period (from \$71 in 1993 to \$103 in 1998).

Text Table 5.6

Key Indicators of Surveyed Hotels, 1993-1998

	Occupancy rates	Profit margin	Average daily room rate
	%	%	\$
1993	59	-1	71
1994	61	3	74
1995	63	6	78
1996	64	12	84
1997	66	15	93
1998	66	14	103

Source: Annual Traveller Accommodation Survey.

Summary

The second half of the 1990s has shown marked improvements for the hotel industry compared to the slump in 1993. As evidenced by the key performance indicators, 1998 was another great year for hotels. The occupancy rate and profit margins remained strong in 1998, and average room rates continued to grow.

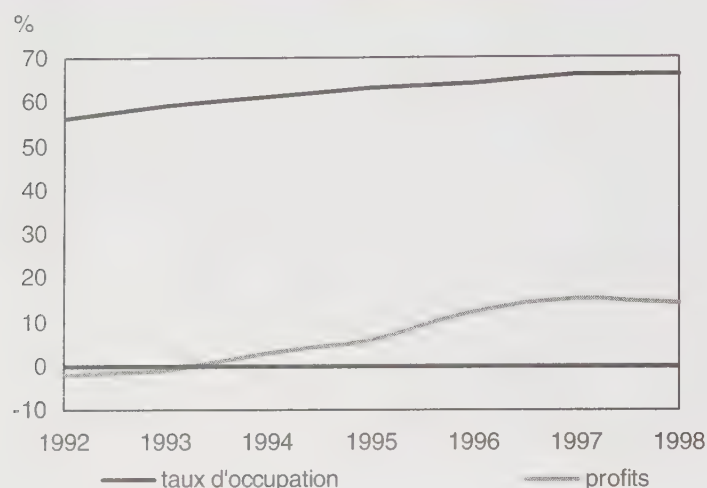
Text Table 5.5

Industry Profile by Size of Hotels, 1998

	Industry		Small		Medium		Large	
	1998	1997	1998	1997	1998	1997	1998	1997
Average # of guest units	127	134	25	27	103	106	364	352
Occupancy Rate (%)	66	66	50	55	61	62	71	71
Gross Margin (%)	14	15	9	9	15	13	15	16
Average Revenue	5,402	5,315	1,196	1,385	3,371	3,303	17,705	16,283
From Accommodation (%)	58	56	25	23	55	55	63	61
Average Daily Rate (\$)	103	93	67	58	82	75	119	109
Revenue per Available Room (\$)	68		33	32	50	47	85	78
Average Expenses (thousands \$)	4,642	4,542	1,094	1,256	2,899	2,861	15,013	13,705
For labour costs (%)	31	33	25	24	32	31	32	35
For cost of goods (%)	15	14	40	38	19	16	10	10

Source: Annual Traveller Accommodation Survey.

Figure 5.1
Hotel Industry 1992-1998, Occupancy Rates and Profits



Source: Annual Traveller Accommodation Survey.

Food Services and Drinking Places Industries

Introduction

The food services and drinking places industry is a growing sector of Canada's economy, accounting for sales of \$28.1 billion in 1999. Food and beverage services represented 20% of all goods and services purchased by visitors in Canada in 1999⁴.

Food services establishments were the primary provider of these services (75.3%), followed by traveller accommodation establishments (21.0%). Canadian commercial food service sector revenues cooled down to 4.4% growth in 1999 after experiencing a 8.1% growth in 1998⁵.

The revenues of the drinking places industry increased the most rapidly (12.4%) in 1999. The growth rates of revenues for the industries of the food service sector were much more modest. Limited-service restaurant revenues rose 4.4% in 1999, slightly outpacing the growth rate recorded by the full-service restaurant revenues (3.4%).

The Canadian Restaurant and Foodservices Association reported that the non-commercial food service sector experienced a 3.1% increase in revenues in 1999⁶.

In 1999, full-service restaurants accounted for 47.7% of all commercial food service sector sales while limited-service

In 1998, Statistics Canada implemented the North American Industry Classification (NAICS) in the annual and monthly surveys of the Food Services and Drinking Places Industries. Under NAICS, the food services and drinking places industry is subdivided into four industries: Full-Service Restaurants, Limited-Service Restaurants, Special Food Services and Drinking Places. The Special Food Services industry includes food contractors, social caterers and mobile food services. These industries, which are primarily involved in the operation of food service establishments, are referred to as the commercial food service sector by the Canadian Restaurant and Foodservices Association (CRFA). The non-commercial food service sector as defined by the CRFA includes food service establishments owned and operated by hotels and motels, hospitals, schools, theatres and other entertainment facilities, vending machines and department stores.

Text Table 5.7

Food Service Sector Revenues - 1999

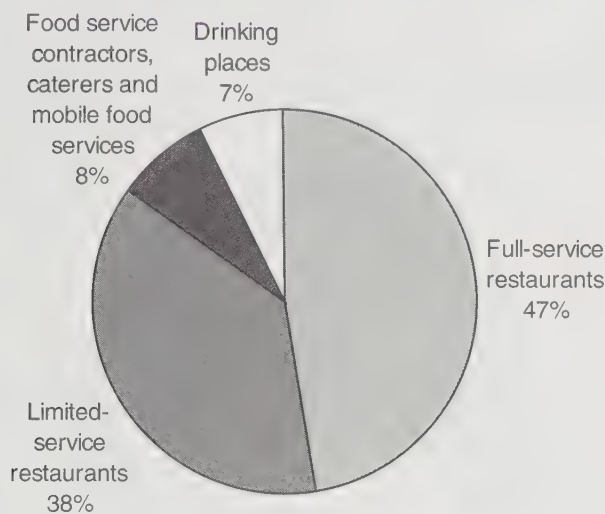
	1999	% Change 99/98
millions of dollars		
Full-Service Restaurants	13,320	3.5
Limited-Service Restaurants	10,590	4.4
Social and Contract Caterers	2,240	3.7
Pubs, Taverns and Nightclubs	2,030	12.4
Total Commercial Sector	28,180	4.4
Total Non-Commercial Sector	8,030	3.1
Total Food Service	36,220	3.9

Source: 1999 Monthly Restaurant, Tavern and Caterer Survey.

restaurants accounted for 37.6%, followed by drinking places at 6.7%, food service contractors at 5.8%, and social caterers and mobile food services at 2.3%.

Provincially, Ontario has 40% of the Canadian market of commercial food services sales. The next largest provincial shares belong to Quebec (19.3%) and British Columbia (15.9%), followed by Alberta (12.9%). The performance of the food services and drinking places industries differed markedly by province in 1999. The Atlantic provinces enjoyed strong growth, except for Nova Scotia where revenues have leveled off from previous years. A booming tourism sector and major offshore energy projects have contributed to this growth⁷.

Figure 5.2
Industry Distribution of the Commercial Food Service Sector in Canada, 1999



Source: 1999 Monthly Restaurant, Tavern and Caterer Survey.

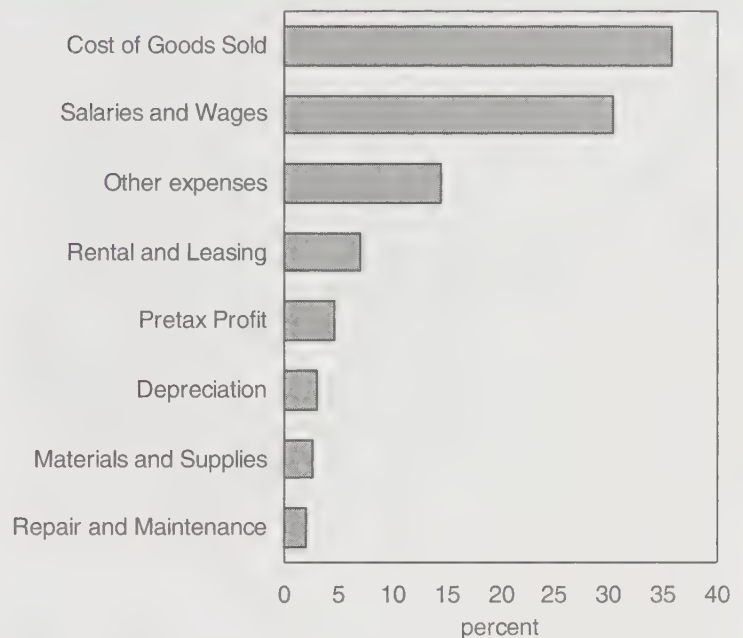
Ontario and Alberta also experienced large increases in revenues, 9.7% and 12.2% respectively. In contrast, Quebec (-4.5%) and British Columbia (-3.7%) recorded a decline in revenues.

The health of the provincial food service sector is very dependent on the economic prosperity of the province.

The cost of goods sold was the largest expense for the commercial food service sector (35.8%). The cost of goods sold includes the cost of alcohol, the cost of food and beverages as well as the cost of merchandise for resale. Salaries and wages was the next largest expense (30.3%).

Profit margins are very slim in the food service sector. The pretax profit margin⁸ for the commercial food service sector was 4.7% in 1998. The most profitable component of the food service sector was food service contractors, caterers and mobile food services with a pretax profit of 7.7%, followed by drinking places at 5.8%, limited-service restaurants at 4.6% and full-service restaurants at 4.2%. Special Food Services incurred lower rental and leasing expenses and other occupancy costs.

Figure 5.3
Selected Expenses as a Percentage of Total Revenue, 1998



Source: Annual Survey of Food Services and Drinking Places, 1998.

Travel Agencies and Tour Operators

Introduction

Travel agencies and tour operators are at the heart of the tourism industry. They play an important role in the distribution network of airlines seats, hotel rooms, resort properties, bus tours and special events, generating nearly \$11 billion in gross revenues in 1998. This section examines the general characteristics of travel agencies and tour operators with regard to revenue, clientele and expense structure.

The 1988 deregulation of the airline industry and the expansion of Internet technologies have had a major impact on the marketing of tourism products. Travel agencies (especially small ones) have established alliances and affiliations to improve access to resources and increase purchasing power. This repositioning of travel agencies is a response to increasing direct sales to consumers and declining travel agents' commission rates.

Travel Agencies

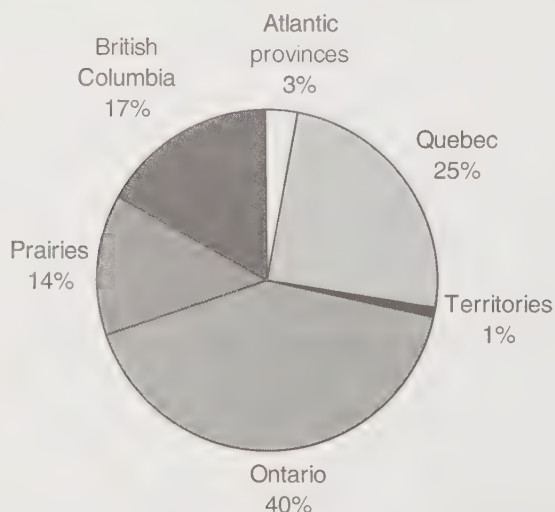
In 1998, more than 5,000 Canadian travel agencies provided multiple services to travellers, such as ticket sales, travel planning, and reservation of accommodation and transport services. They also continue to act as agents for tour operators and field questions and complaints from travellers. Travel agency services are offered to clients usually with a small direct fee, to complement the commission from suppliers, which is the primary source of revenue for travel agents. The travel agencies industry is labour-intensive, with wages and salaries representing more than half the operating costs.

In 1998, the travel agencies made \$1.8 billion in revenues. Most of the revenue (47%) was commissions from the sale of airline tickets. Commissions from the sale of packages and cruises represented close to a third of the revenues (32%). The rest of the revenues were from commissions originating from the sales of services such as accommodation, vehicle rentals and insurance. The high percentage of revenues from the sale of airline tickets makes travel agencies highly vulnerable to airlines' efforts to reduce agent commissions and the technological changes such as ticket-less travel.

Travel agents activities are concentrated primarily in central Canada: Ontario and Quebec accounted for 65% of the industry's total revenues (*Figure 5.4*).

Wages, salaries and employees benefits were the largest single operating expense for travel agencies in 1998,

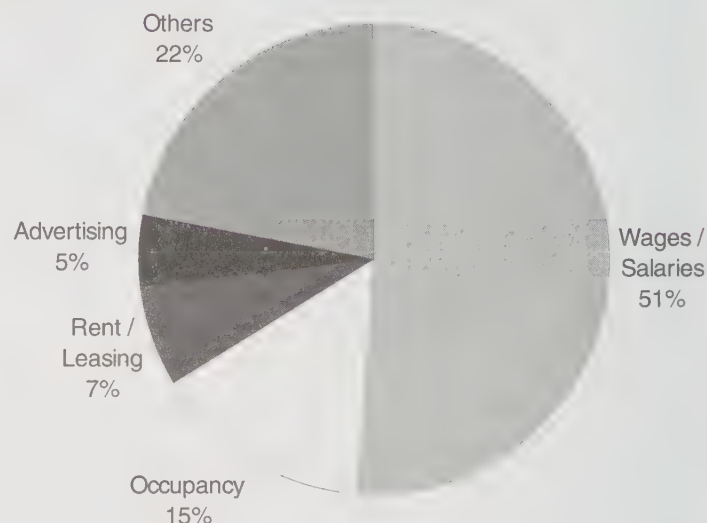
Figure 5.4
Distribution of Revenue by Region, Travel Agencies, 1998



Source: Annual Survey of Travel Arrangements, 1998.

accounting nationally for 51% of total revenues. Far less important than wages and salaries are occupancy costs, rental / leasing and advertising costs (*Figure 5.5*).

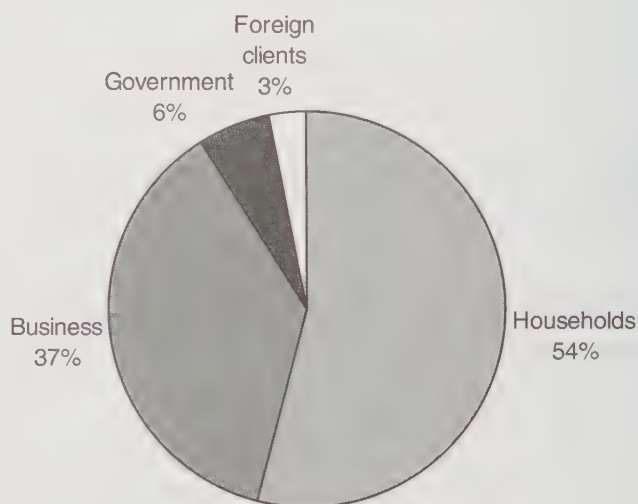
Figure 5.5
Distribution of Operating Expenses by Type as a Percent of Total Revenue, Travel Agencies, 1998



Source: Annual Survey of Travel Arrangements, 1998.

Services to households or individuals travelling for leisure purposes accounted for 54% of all revenues in 1998. Corporate travel generated 37% of total revenue, followed by government travel with 6%. Sales to foreign visitors accounted for only 3%. (*Figure 5.6*)

Figure 5.6
Distribution of Client Base, Travel Agencies, 1998



Source: Annual Survey of Travel Arrangements, 1998.

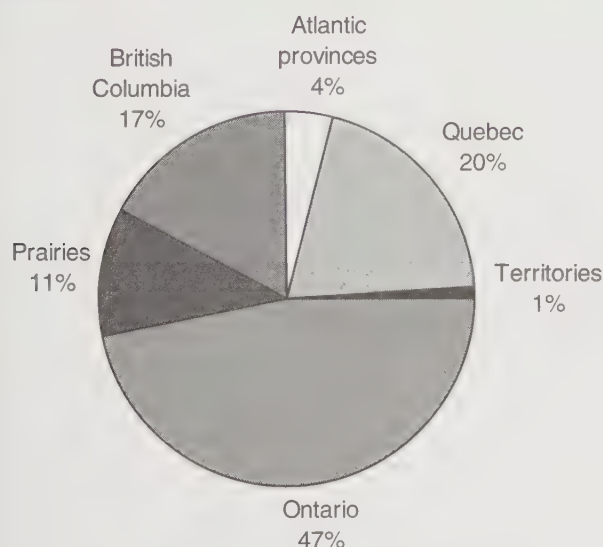
Tour Operators and Wholesalers

In 1998, the 1,022 Canadian tour operators and wholesalers generated \$4.2 billion in revenues. Wholesalers purchase a range of tourism products (hotel rooms, airline tickets, bus tours, entry to attractions, etc.) and organise packages for resale to consumers either directly or through travel agencies. Wholesalers, motor coach operators, operators of foreign and domestic tours, and other transport companies make up this segment of the industry.

This sector is heavily concentrated in a few large firms. The top 20 tour operators accounted for 60% of the industry's revenues in 1998.

Revenues of tour operators are primarily generated from the sale of tour packages (64%). Wholesaling revenue from the sale of travel products to distributors accounted for 32% of total revenue and the remainder came from other revenue in the form of franchise fees, royalty and interest revenues. Ontario and Quebec accounted for 67% of all revenues in the industry. British Columbia generated 17% of total revenues (Figure 5.7).

Figure 5.7
Distribution of Total Revenue by Region, Tour Operators and Wholesalers, 1998

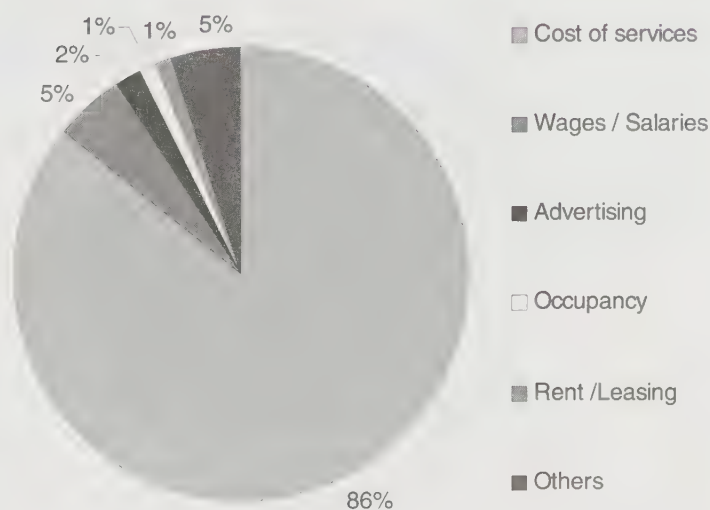


Source: Annual Survey of Travel Arrangements, 1998.

The primary expenditure for this industry was the cost of tours / cruise package components, accounting for 86% of total revenues in 1998. Salaries, wages and benefits accounted only for 5% of total revenues, in contrast to travel agencies (Figure 5.8).

Figure 5.8

Distribution of Operating Expenses by Type, Tour Operators and Wholesalers, 1998



Source: Annual Survey of Travel Arrangements, 1998.

The tour operator and wholesaler industry is divided into two distinct segments with very different characteristics. Operators of foreign tours supply tour products to Canadians, who travel to foreign destinations, while "receptive tour operators" sell Canadian packages to foreign visitors to Canada.

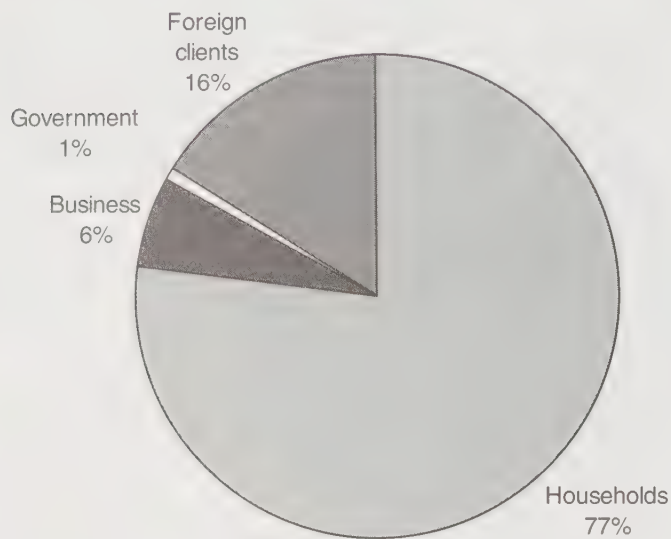
These two kinds of tour operators sell somewhat different types of packages. Bus tours are much more popular with receptive operators; in addition, receptive tours tend to be much shorter than foreign tours. Winter is the most popular season for foreign tour operators, while summer accounts for close to half of all packages sold by receptive tour operators.

Tour operators and wholesalers earn most of their revenue (77%) from sales to domestic households or individuals travelling for pleasure. Only 6% was derived from sales to business and 1% from sales to government (Figure 5.9). The remainder represented sales to foreign clients.

Notes

¹ National Tourism Indicators, catalogue no. 13-009-XPB, 1999.

Figure 5.9
Distribution of Client Base, Tour Operators and Wholesalers, 1998



Source: Annual Survey of Travel Arrangements, 1998.

- ² Hotels and motor hotels group also includes resorts and casino hotels. Other accommodations group comprises six sub-categories: cottages and cabins, bed and breakfasts, guest houses, recreational vehicle parks and campgrounds, hunting and fishing camps and vacation camps.
- ³ All statistics come from the Annual Traveller Accommodation Survey, Service Industries Division, Statistics Canada.
- ⁴ National Tourism Indicators, catalogue 13-009 XPB, 1999.
- ⁵ The Monthly Restaurants, Caterers and Taverns Survey (MRCTS) excludes establishments which do not have employees. The sales of non-employer food services establishments accounted for less than 2% of total sales according to the 1998 Annual survey of Food Services and Drinking Places conducted by Statistics Canada.
- ⁶ Foodservice facts, market review and Forecast, 2000. Canadian Restaurant and Foodservices Association.
- ⁷ Ibid.
- ⁸ Pretax profit margin is the difference between total revenue and total expenses (excluding income tax expense) expressed as a percentage of total revenue.

Tourism and the Trend Towards Consolidation

The Airline, Hotel and Distribution Industries¹

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Under the direction of Michel Archambault, holder of the UQAM Chair in Tourism

Introduction

The phenomenon of consolidation, characterized by mergers, acquisitions and alliances, is an excellent means of responding to globalization, and constitutes an increasingly common way for companies to position themselves on the global chessboard. Consolidation lets businesses expand their market shares, deal more effectively with the competitive environment, pool the resources they need to respond to various technological and economic imperatives, conduct joint marketing activities, and deal with deregulation or government-sponsored free-trade initiatives. This trend is continuing to engender a series of structural upheavals that are resulting in a profound modification of the tourism scene, compelling industry players to alter their business practices and encouraging the emergence of new, non-traditional contenders.

While the question may arise of which groups will be best served by these changes, here is how the trend toward consolidation is taking shape in the airline industry, the distribution network and the hotel industry. Furthermore, in exploring the process of consolidation, we shall also consider the roles of facilitator and of technological innovator.

Airline Industry

“Turbulent” is a good description of the situation in airline industry today. Free trade, privatization, creation of subsidiaries and alliances have not only marked the development of this sector, but occasionally put its profitability to some rough tests.²

Since the airline industries of North America and Europe have been deregulated, all international airline industry services have been governed by bilateral open-skies agreements³. Because of government regulations and limited resources for dealing with the increased number of air passengers, airlines have opted for alliances⁴ or bilateral agreements to attenuate these obstacles and to offer service that meets customer needs.

Reservations systems (GDS) like Sabre, Galileo, Amadeus and WorldSpan were originally at the hearts of airline industry alliances, but partner selection today is based on hubs,⁵ time slots and network complementarity. A deal between a major European firm and an American company is usually a prerequisite for creating an international alliance, as North American and European passenger

traffic makes up 54% of the world total. It is on this basis that five major international alliances (Wings⁶, Star Alliance⁷, Qualiflyer⁸, oneworld⁹ and SkyTeam¹⁰) representing 60% of the world's air traffic have been forged. However, for various reasons, such as degree of integration and competition from member companies in the same markets, such alliances appear unstable these days.

The current emphasis in the American skies is primarily on mergers and acquisitions rather than on strategic alliances, because of the maturity of the market and the development of mega-airports yielding few opportunities for growth. Furthermore, there is increasing pressure by shareholders to maintain a high return on investment. These factors make up most of the equation. In Canada, the proximity of the American border, the consolidation of air traffic between certain towns and the fact such traffic moves primarily on an east-west axis, explains the difficulty of producing a critical economic mass essential to the viability of a hub. Furthermore, since acquiring Canadian International, Air Canada has controlled nearly 90% of the Canadian market. Not long after this transaction, Air Canada announced it was consolidating its regional subsidiary carriers to provide itself with greater flexibility in operations.

With the February 2000 submission of its draft bill to restructure the airline industry, the Canadian government is trying to create an environment that promotes competition. The first draft report on this restructuring process was filed in early February 2001.¹¹ The dominant position of Air Canada elicits much concern among regional carriers and among the population as a whole. In the wake of the merger, many were dissatisfied with service to remote areas (reduced service and high fares), fare hikes, fewer destinations, decreased numbers of flights on certain lines, reduced numbers of seats, reworked schedules, inadequate competition, damage to the tourist industry (cancellation of certain destinations requested by tourists, decreased numbers of promotional tickets, etc.) and to airports competing for capacity and service, as well as the announced elimination of 3,500 jobs.

It is not easy to define how the airline industry has been affected by the development of alliances. Companies, on the one hand, maintain such alliances naturally result from new economic and technological phenomena and serve to improve consumer service. However, many consumer associations only see the alliances as a way of making big companies richer to the detriment of consumers and

complain about the poor quality of service and excessive fares. Some even think passengers would do better if smaller airlines were to enter into the fray. Furthermore, the trend toward consolidation taking place worldwide in the airline industry is of concern to the antitrust authorities, who are watching it rather reluctantly.

Largely a factor of the amount of integration present in an alliance, economies of scale and the reduction of operating costs resulting from resource sharing positively affects partner earnings. Alliances provide opportunities for growth through development of new markets and geographic expansion, as well as through a rise in existing market shares. Alliances generate increased numbers of destinations, as well as additional numbers of direct flights, without thereby requiring any aircraft purchases. The process of code sharing¹² represents 70% of such airline alliances, the rest involving shared airport services, joint frequent-flyer programs, trade partnerships and so forth. By providing better visibility to computerized reservations systems (CRS), a code-sharing based alliance represents a clear plus for members. However, it may sow confusion among passengers and the organization of such information in the CRS does not already result in the best prices to passengers. More extensive frequent-flyer programs resulting from alliances are of benefit to or regular passengers. On highly competitive routes, ticket prices may drop, but the virtual monopolies or dominant positions held by certain airlines may lead to limited capacity, fewer flights and fare hikes.

Over the past few years, partnerships have been emerging between airlines and complementary sectors like car rental firms, hotels, credit card companies and so forth.

Alliances are still in an experimental stage. Their stability appears sometimes precarious but they will continue to evolve and result in more formal integration of the industry internationally, assuming regulatory obstacles are abolished and free trade becomes more prevalent. We should not expect any radical changes over the next five years and we will surely see other Onex-styled takeover bids in Canada. Agreements will continue to plug any remaining gaps in the networks, with better facilities for serving passengers being the end result.

At the very least, it is clear this industry will continue to feel the effects of the trend toward consolidation.

Distribution Network

The most recent sector of the tourism industry to have entered the race to produce mergers, takeovers and alliances is the now highly consolidated distribution network. Its big players hold major market shares and this race to consolidate continues.

Under such circumstances, tour organizers concerned with ensuring their profitability are pursuing a strategy of vertical integration with respect to airlines, hotels, agency networks, cruise organizers, etc. This gives them better control over the various links in the chain involved in producing their packages and distributing their products. Furthermore, it ensures better control over costs and service quality because consumer expectations are high, and this in turn boosts competitive pressure.

Acquisitions form an integral part of the growth strategies of major groups because they permit the latter to pick up new market shares, new customer bases and new skills. Entry into new territories is aimed at optimizing sales efforts among different customer groups so more airline seats can be sold and more hotel rooms booked. Furthermore, consolidation is driven by imperatives of profitability and characterized by economies of scale that are all the more significant given that profits, on the whole, remain modest.

Europe is home to the most extensive consolidation in this sector. Its five leading groups control more than 67% of all travel sales, estimated at US\$30 billion. This race to consolidate should continue, although the British market has matured and consolidation has reached its peak in Germany. These big conglomerates are continuing to apply their intensive market penetration strategies while absorbing substantial losses with the aim of tightening their future grip on other European countries where the provision of supply and services is less structured.

Transat A.T. Inc. is the only major integrated Canadian group and it remains highly active in terms of acquisitions both in Canada and abroad. On the Canadian market, Transat faces competition from two big British contenders through North American Leisure Group (Airtours), affiliated with Skyservice and Signature (First Choice), affiliated with Royal. Finally, Canada 3000 completes the portrait of big Canadian players in this industry.

The U.S. distribution network is different in many respects from that of Europe because it includes few vertically integrated groups, Carlson being the exception. The American network is characterized by airline dominance

because of vast domestic traffic. However, we can begin to detect the first signs of consolidation within the distribution network, as certain foreign tour operators have attempted to position themselves on the American market.

Independent operators, offering vacation packages with no specific niche, now find it difficult to challenge these big conglomerates, which are constantly boosting their market shares. It has become almost impossible for independents to compete with them in terms of price and their marketing efforts cannot compare to those of the conglomerates. Through their distribution networks, such conglomerates have even been able to block the sale of competitive products. However, they require small independent agencies to distribute their full range of products.

Not only must the distribution network contend with the industry's trend toward consolidation—it is also faced with lower commissions from the airline industry and the advent of the Internet which is redefining the rules of the game. Given the many issues at play, the question arises of how much longer “independents” will continue to thrive.

The economies of scale achieved by the big groups are resulting in the sale of a standard, homogenized product. This in turn is opening the door wide to strategies of differentiation and specialization. Independent firms could thus manage to survive by offering diversified products and services, charging customers for issuing airline tickets, exploiting new product and market niches created by the trend toward consolidation of an industry offering mainly mass market packages.

New Technologies: a Challenge for the Distribution Network

The terms technology and travel can be expected to go hand-in-hand from now on and the tourist industry will benefit from the exponential growth of the Internet to become the leader of the retail e-commerce market. Having substantially modified their distribution practices, a number of companies are now placing the Internet at the core of their strategies¹³ because statistics show it to be a promising market.

Consumer needs with respect to the Internet have followed a certain evolution ranging from searches for information, to making easy purchases when desired, getting the best prices as well as various purchasing alternatives (online, over the phone, etc.) and the appearance of “click-and-mortar” agencies that can meet such concerns.

For businesses, the main impediments to using the Internet are the costs of effectively positioning themselves on the Web and the lack of customer security with respect to virtual sites, as legislation has barely begun to tackle Internet-related issues.

The two main prerequisites for succeeding in cyberspace are an extensive offering—such as unique experience, corporate image or wide product line—and the ability to reach a large number of prospective customers. This means expanding the number of distribution channels, registering with major portals and destination management systems, as well as forging alliances with big online agencies.

Internationally, online travel agencies are clearly dominated by American firms, with Travelocity.com and Expedia leading the pack and the top twelve American contenders sharing 87% of the sector's 1999 earnings. Airlines are also creating some turbulence on the Internet. Forrester Research predicts that by the end of the year, airlines will have all cut their commissions to online agencies to zero, giving the latter the choice of either charging for their services or watching their profit margins shrink.¹⁴ Furthermore, airlines, disturbed by the presence of new virtual retailers, have launched two competitive projects: hotwire.com and orbitz.com, a site that should go online in the summer of 2001.

While the trend toward consolidation of most online companies is slowing down, travel sector businesses are proceeding full steam ahead. Over the next year, the number of transactions should rise, although this highly competitive market impedes small businesses. Having already allowed themselves to be lured by the dotcoms, investors are now thinking twice and financing opportunities are increasingly rare.

As one observer noted, "The development of Web sites and recent announcements about the creation of huge portals among competing companies suggests that the now-stated goals of alliances is to become free of the classical distribution channels."¹⁵

Hotel Industry

The phenomenon of consolidation continues to be a major force shaping the hotel industry and improving the market positions of major groups.

In terms of numbers of rooms, sales, numbers of franchises and presence on five continents, hotel groups are now posting unprecedented growth, mainly through takeovers.

Although the annual number of transactions is on the downswing, new waves of consolidation should be anticipated.

A brief glance at the statistics confirms this process of consolidation, but only represents an infinitesimal portion of worldwide supply, since just 10% of all hotel rooms are sold under the names of the world's fifty leading groups in this sector. That means, even if the trend toward consolidation in the hotel sector is quite prevalent, the industry remains fragmented and most hotel operators are independents.

Major U.S. hotel groups dominate the industry worldwide. In 1999, eight of the ten biggest hotel groups were located in the United States¹⁶ and more than half of the fifty leading hotel groups worldwide were U.S. based. Faced with a mature market (70 % of all hotels belong to franchise operations), virtually all American hotel operators maintain strategies of geographic expansion outside North America. The strategies of Europeans seeking to penetrate a U.S. market already saturated with such franchises is to buy existing franchises rather than to set up their own.

Hotel chains are less prevalent in Europe, where 70% of all hotels belong to independent operators. However, the major European contenders led by Bass and Accor have clearly decided to expand by initiating a new wave of consolidation. The Asia-Pacific region seems a likely candidate to attract the world's leading groups, since 75% of its hotels do not belong to any franchise and only 8% to 12% of all hotel rooms belong to the four giants of the hotel industry.

Just like the big international companies, the major Canadian hotel industry players are bolstering their positions to make headway among the industry's leaders, despite the decline in hotel business in Canada as well.¹⁷

While new technologies are transforming the hotel industry and require considerable investment, some independent establishments have favoured voluntary associations to buttress their commercial positions, rather than ceding to market pressures toward franchising. However, even within such associations, trends to consolidation are taking shape, as in the partnership between Relais & Châteaux and Leading Hotels of the World which gave birth to Luxury Alliance, as well as IndeCorp and Preferred, Summit and Sterling, and so forth.

The big hotel groups are making positive contributions to the growth of the tourism industry and to the socio-economic

well-being of rural areas. One example is the arrival of the Intrawest real-estate group in Mont-Tremblant and in Whistler, inspiring leading hotel chains to invest in these renowned vacation settings. Furthermore, the financial power of such groups lets them develop the kind of top-of-the-line industry that would often have had trouble growing on a mere regional scale. Under such circumstances, major hotel group often generate tourist traffic that also serves independent hotel operators. Similarly, in their attempts to expand, the major groups are offering a valuable alternative to independent operators through franchise affiliation. Guests also benefit. With the increase in number of worldwide franchises, supply diversifies and offers a certain assurance of product quality. Furthermore, consolidation is resulting in the development of niches by independents, with customers benefiting from a supply better attuned to their needs. Ultimately, new technologies provide added value to the hotel product and offer an increased number of distribution channels, making it that much easier to book rooms.

Conclusion

There are many possible responses to the phenomenon of consolidation and the increasing use of new technologies. There is no single formula, and while consolidations seem inevitable, industry players can capitalize on opportunities engendered by this new dynamic. It is with a view toward the tourism of tomorrow that small business should gear their strategies to carving out prime stakes in national and international markets.

We can never standardize and integrate the entire industry into big groups. A future remains for all kinds of businesses, not just the big ones.

Notes

- ¹ To learn more about the international conference "Tourism and the Trend Towards Consolidation," held in Montreal in November 2000, and the contents of publications produced for that event, please check our Web site: www.unites.uqam.ca/tourisme

You can also obtain the Conference Background Paper in French or English and the full set of Conference Proceedings from the UQAM Chair in Tourism:

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Conference Background Paper: Tourism and the Trend Towards Consolidation

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- ² Taken from a speech by Pierre Jeannot, director general, International Air Transport Association (IATA). Proceedings of "Tourism and the Trend towards Consolidation," p. 5.
- ³ Canada is a signatory to more than 60 bilateral agreements pertaining to airline services with countries throughout the world and the United States has signed some forty, not taking into account, however those with Spain, Hong Kong and the UK.
- ⁴ International alliances are nonetheless subject to the approval of the US Department of Transportation (DOT), the European Commission and the Canadian Transportation Agency, based on the origins of the airlines involved in the deal.
- ⁵ Hubs are strategically located airports out of which many routes radiate. Such airports are used by the bigger airlines as transfer points for passengers, enabling them to serve more markets.
- ⁶ KLM, Northwest and Continental (included because of its big interest in Northwest).
- ⁷ Air Canada, Air New Zealand, ANA, Ansett Australia, Austrian Airlines, British Midland, Lauda Air, Lufthansa, Mexicana, SAS, Singapore Airlines, Thai Airways, Tyrolean Airways, United Airlines and Varig.
- ⁸ Air Europe, Air Littoral, TAP Air Portugal, AOM, Crossair, LOT Polish Airlines, PGA Portugal Airlines, Sabena, Swissair, Turkish Airlines and Volare Airlines.
- ⁹ Aer Lingus, American Airlines, British Airways, Cathay Pacific, Finnair, Iberia, Lanchile and Qantas.
- ¹⁰ Air France, Delta Airlines, Korean Air, Aeromexico and CSA Czech Airlines (beginning in April 2001).

- ¹¹ A second report is due August 2001 and the final report will be filed within twelve to eighteen months.
- ¹² Commercial agreement between two airlines maintaining their complete independence. Each airline buys a block of seats on the other's flights and then sells these seats as if they were their own. Such agreements may take different forms. They can apply to a single route in a single market or extend to many routes and different markets.
- ¹³ Nearly 90% of U.S. travel companies with Web presences offer online purchase options.
- ¹⁴ The two biggest online agencies, Expedia and Travelocity.com are expected to lose 25% of their earnings if all airlines follow in the steps of KLM and Northwest.
- ¹⁵ HÉGUY Jean-Baptiste. *L'Écho touristique*, April 21, 2000.
- ¹⁶ Cendant Corp., Marriott International, Choice Hotels International, Best Western International, Hilton Hotel Corp., Starwood Hotels & Resorts, Carlson Hospitality Worldwide, Hyatt International.
- ¹⁷ 1998: 175 agreements worth a total \$1.3 billion; 1999: 30 agreements for amounts totalling nearly \$400 million.

CHAPTER 6

NATIONAL TOURISM INDICATORS - 1999 RESULTS

*Income and Expenditure
Accounts Division*

Tourism Demand in Canada

Tourism spending in Canada topped \$50.1 billion in 1999. Non-residents spent \$15.3 billion or 30% and \$34.8 billion or 70% was spent by Canadians. The non-residents' share of total expenditures has been steadily increasing in the last ten years. This is consistent with the trend of inbound travellers. Outlays by foreign visitors increased 7.7% in 1999 compared to 11.4% in 1998. In comparison spending by Canadians posted a 6.0% increase compared to 5.1% in 1998. The overall increase was 6.5%, a slightly reduced pace compared to 1998 (7.0%). Strength originated mainly in transportation.

After removing inflation, tourism expenditures in the country posted a rate of increase of 3.2% compared to 5.0% in 1998. The increase in spending by non-residents (5.1%) was once again the main source of growth in overall demand. Canadians spent 2.4% more, growth rate less than the one recorded in 1998, when it reached a record level of 3.3% for the decade.

Of the different expenditures categories, transportation was by far the largest, accounting for 40% of total tourism spending in Canada in 1999. Next came other non-tourism commodities (20%), food and beverages (16%), accommodation (14%) and other tourism commodities (10%).

In 1999, expenditures in all major categories were up. Among these, transportation grew by 8.5%, the strongest increase of all major categories. After a drop in 1998, expenditures for vehicle fuel jumped 11.1%, the largest growth in ten years. This was mainly due to the increase in oil prices. Air transportation expenditures which accounted for more than half of all expenditures on transportation, increased by 9.6 %. The demand for other tourism commodities which includes recreation and entertainment services as well as travel agency services ranked second with a 5.7 % increase in 1999.

Text Table 6.1

Tourism Demand in Canada - 1999

	Domestic Tourism Demand in Canada	Percent change from preceding year	Foreign Tourism Demand	Percent change from preceding year	Total Tourism Demand in Canada	Percent change from preceding year
	\$ millions	%	\$ millions	%	\$ millions	%
Transportation	16,165	8.5	3,919	8.5	20,084	8.5
Passenger air transport	9,426	9.9	2,170	8.3	11,596	9.6
Passenger rail transport	144	8.3	88	6.0	232	7.4
Interurban bus transport	412	1.2	201	6.3	613	2.9
Vehicle rental	361	0.3	653	9.0	1 014	5.7
Vehicle repairs and parts	1,907	2.3	83	3.8	1,990	2.3
Vehicle fuel	3,456	11.2	469	10.6	3 925	11.1
Other transportation	459	2.9	255	9.0	714	5.0
Accommodation	3,636	2.1	3,424	8.4	7,060	5.1
Hotels	2,588	2.6	2,688	8.6	5,276	5.6
Motels	634	-0.5	390	7.4	1,024	2.4
Other accommodation	414	3.0	346	7.8	760	5.1
Food and beverage services	4,562	3.1	3,541	7.6	8,103	5.0
Meals from accommodation services	610	-0.3	486	7.8	1,096	3.1
Meals from food and beverage services	2,774	3.9	2,170	7.6	4,944	5.5
Alcohol, from accommodation services	315	0.3	292	7.7	607	2.8
Alcohol from food and beverage services	689	3.0	471	7.0	1,160	4.6
Meals and alcohol from other industries	174	8.1	122	8.9	296	8.4
Other tourism commodities	3,649	4.9	1,424	7.8	5,073	5.7
Recreation and entertainment	1,984	6.0	1,310	7.7	3,294	6.7
Travel agency services	1,610	3.7	63	10.5	1,673	4.0
Conference fees	55	0.0	51	6.3	106	2.9
Total tourism commodities	28,012	6.3	12,308	8.1	40,320	6.8
Total other commodities	6,812	4.8	2,980	6.2	9,792	5.3
Tourism expenditures	34,824	6.0	15,288	7.7	50,112	6.5

Source: National Tourism Indicators, Catalogue no. 13-009-XPB.

Total inbound travel rose 2.1% in 1999 compared to 6.6% in 1998. This is the seventh consecutive annual increase. The number of travellers from the U.S. increased by only 1.8% in 1999 after rising 8.3% in 1998. The number of travellers from all other countries recovered to an increase of 5.2% in 1999. This recovery resulted mainly from an increase of 4.1% in the number of travellers from Europe, coupled with a rise of 7% in the number of travellers from Asia/Pacific.

In 1999, Canada's travel account balance (including passenger fares), the difference between the expenditures of foreign visitors in the country and those of Canadian residents outside the country, measured its lowest deficit since 1988, declining to \$3.0 billion.

The Tourism Gross Domestic Product (GDP)

The tourism GDP allows analysts to compare the activities resulting from tourism with the activities of other industries and to determine their relative magnitude.

The tourism GDP at factor cost reached \$20.3 billion in 1999, representing 2.5% of the GDP of the economy as a whole. This is similar to the 1998 and slightly higher than the 1990 rate of 2.3%. Over the period 1990-1999, the tourism GDP rose by 51%, while the overall GDP increased by approximately 39%.

The tourism GDP at factor cost is the total valued added by both tourism and non-tourism industries that is generated by the provision of goods and services to tourists and same-day visitors. An industry is considered a tourism industry if it provides goods and services to visitors, and if in the absence of tourism, it would cease to exist or would continue to exist but at a greatly reduced level.

Prices for Tourism Goods and Services Rose Faster than the Consumer Price Index

Inflation in tourism goods and services, as measured by the tourism commodities implicit price index, increased to 3.8% in 1999, after a rise of 2.1% in 1998. Prices of transport and accommodation services increased the most, rising by 4.5% and 4.6% respectively. Transportation prices advanced as a reflection of the increasing price of fuel. In comparison the consumer price index (CPI) for all items posted an increase of 1.8% in 1999 and 1.0% in 1998.

Employment Growth Generated by Tourism Slowed

Any firm, regardless of the industry in which it operates, uses some combination of materials (capital) and manpower (labour) in its production process. Firms in the tourism field are no exception to this rule. Perhaps what distinguishes tourism is its large labour component, since it is generally recognised as a highly service-oriented activity. Visitors' demand for tourism commodities, technological change, competition among firms, and various government policies are only a few of the factors that can influence the level and structure of employment in the tourism field.

Employment generated by tourism, as measured by the number of part-time and full-time employees, increased to 524,300 in 1999, up 1.2% from one year earlier, compared to 3.0% in 1998. All major tourism industries experienced a slowdown in employment growth in 1999. Tourism employment growth was outpaced by that of the total business sector (3.5%), while for the year 1998, these increases were almost equal.

The Canadian Tourism Satellite Account: An Analysis of Results for 1988 and 1992

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Introduction

In 1994, Statistics Canada published its first estimates of a Tourism Satellite Account (TSA) for the 1988 reference year. Many innovative by-products or uses have since emerged. The publication of quarterly tourism indicators, a tourism impact model and a measure of government revenue attributable to tourism are only some Canadian examples of products derived from the TSA. Ultimately, all have had the same objective: to measure the importance of tourism within the economy, although from different standpoints. It should be noted that, given its framework, the TSA makes it possible to obtain a detailed and credible economic picture of the disparate phenomenon which is tourism.²

Events elsewhere in the world have left their mark on the field of tourism statistics since 1994. The most recent was the United Nations Statistical Commission's adoption of a conceptual framework in March 2000. This development was the culmination of years of work by a number of individuals and organisations from around the globe. In addition, since 1994, various countries have established their own TSAs, thus furthering discussion on the theoretical and practical bases of a TSA and thereby giving impetus to the authorities involved in developing the framework. The Nice conference in June 1999 on the economic impact of tourism also played a fundamental role in advancing the conceptual and methodological framework. The Vancouver conference (May 2001) was part of an international effort to establish standards and methods to permit economic comparisons of tourism activity among countries.

In all of these efforts, there have been ongoing concerns on the part of Canadian researchers with respect to the need for regular updates of the Canadian TSA. Although the development of various extensions of the 1988 TSA has delayed the implementation of this proposal on several occasions, its importance is nevertheless an accepted fact. This article marks the culmination of the work involved in updating the TSA for the 1992 reference year and of revisions to 1988. It also provides a brief introduction to the work currently being done to develop provincial TSAs for the 1996 reference year.

This article is above all concerned with results. Concepts and methodologies employed are not discussed. The results of the Canadian TSA for 1992 are presented. The structural changes that occurred between 1988 and 1992 are also discussed. Detailed results for 1988 and 1992 are reported in the appendices.

Results for 1988 and 1992

The results for 1992 enable us to establish a basis of comparison with those for 1988 and thereby draw conclusions about some of the possible structural changes in tourism in Canada. This section contains an analysis of the major TSA aggregates (Demand, Supply, Gross Domestic Product and Employment) from this point of view.

The Economic Context

It is useful to note some significant economic events that took place in Canada between 1988 and 1992. These may have influenced the tourism sector in terms of its size, composition, prices and employment levels: First, on January 1, 1989, the Free Trade Agreement between the United States and Canada came into effect. One of the measures introduced was the immediate or gradual elimination of customs duties on certain products. Second, most of 1990 and the beginning of 1991 were marked by an economy-wide recession with four quarters of declining real Gross Domestic Product (GDP). GDP in constant prices was nearly 3% less at the end of the recession than at the beginning. In the same period, the United States was also affected by a slowdown. Third, on January 1, 1991, the Goods and Services Tax (GST - value-added tax) was introduced. This 7% tax (applied at the point of consumption) replaced the former federal sales tax (applied at the point of production and distribution). As a result, the federal taxation base was expanded to cover services, including those related to tourism.

Tourism Demand in Canada

Tourism demand in Canada, which is defined as the sum of domestic demand³ and foreign demand⁴, reached \$28.5 billion in 1988 (current prices). Four years later, in 1992, it stood at \$33.3 billion, representing an average annual increase of 4.2%⁵.

Excluding business expenditures, tourism demand in Canada rose from \$21.4 to \$25.1 billion during the period under study, which translates into an average rate of growth of 4.3% per year. In comparison, total personal consumer spending progressed more quickly, namely 5.4% on average per year. With inflation removed, the gap between the two measures is all the more pronounced, with personal spending showing an average annual increase of 1.4%, while tourism expenditures dropped 0.9%.

There were no significant changes, between 1988 and 1992, in terms of the share of the major categories of tourism demand in the country. Expenditures on transportation remained the highest at 43.2% and 41.6% of the total in 1988 and 1992, respectively (*Text Table 6.2*). Expenditures on air transportation and private car use led in this category, with the former even surpassing expenditures on accommodation and food and beverages.

Other major categories of considerably lower but similar proportion (14%-16%) include accommodation and food and beverage services as well as non-tourism commodities.

Text Table 6.2

Share of Expenditure Categories by Type of Demand

As a Percent of Total

Commodities	Domestic (business expenditures)		Domestic (personal expenditures)		Foreign		Total	
	1988	1992	1988	1992	1988	1992	1988	1992
Passenger transportation	58.9	56.8	42.3	41.1	28.1	26.0	43.2	41.6
Of which: air	36.0	33.2	16.6	17.1	17.7	14.8	21.7	20.6
Of which: use of private vehicle	15.5	16.0	20.6	19.2	4.8	4.5	15.8	15.1
Accommodation	21.7	23.0	8.0	8.8	18.5	19.1	13.8	14.6
Food and beverages	17.0	17.3	12.6	11.9	24.0	24.4	16.3	16.0
Other tourism commodities	2.3	2.8	16.2	15.9	8.9	9.7	11.1	11.3
Total tourism commodities	99.9	99.9	79.1	77.7	79.5	79.2	84.4	83.5
Other commodities	0.1	0.1	20.9	22.3	20.5	20.8	15.6	16.5
Total tourism expenditures	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: Tourism Satellite Account, 1988 and 1992.

Whereas expenditures on food and beverages were in second place at 16.3% in 1988, they fell to third place in 1992, when they were overtaken by the other non-tourism commodities category⁶. Expenditures on accommodation followed closely, at 13.8% and 14.6% of the total in 1988 and 1992.

The shares differ if the patterns of domestic business expenditures are compared with personal expenditures, and those made by non-residents. For instance, transportation represented approximately 57%, 41% or 27% of total purchases depending on whether Canadian businesses, individuals or non-residents were considered. Nonetheless, it should be pointed out that proportions for all categories remained relatively stable between the two years under study.

Further, it is notable that there is a far more uniform distribution in each expenditure category among non-residents compared to domestic demand. Canadians who made personal expenditures spent a small proportion of the total on commercial lodging (around 8%), which may have been attributable to their main reason for travelling. In about one-third of cases, the purpose of domestic travel was to visit friends or family.

Among the five main types of expenditures, accommodation registered the largest increase between 1988 and 1992, with an average annual increase of 5.8%. However, the major category of transportation recorded the lowest growth. In terms of individual commodities, expenditures on motels, travel agencies and vehicle rental grew the fastest. People travelling in Canada bypassed the train as a means of transportation between 1988 and 1992, when expenditures fell by nearly 26%, representing an average annual decrease of 6.5%.

An analysis of tourism demand, from the point of view of the relative importance of the types of tourists⁷, also demonstrates the high stability between 1988 and 1992. Thus, the share of expenditures by foreign tourists in the country's total demand remained virtually unchanged, declining marginally from 22.7% (\$6.5 billion) in 1988 to 22.3% (\$7.4 billion) in 1992. This stability was essentially attributable to the fact that the growth in expenditures by visitors from overseas exceeded that originating from the United States. The number of American visitors fell by 2.6% (average rate) between 1988 and 1992, whereas those from overseas increased by 1.6%. The U.S. recession may have influenced this situation more than the depreciation of their currency in relation to the Canadian dollar.

Purchases by Canadian tourists in Canada (domestic demand) continued to hold a significant place (78%), reaching \$25.9 billion in 1992, an increase of \$3.9 billion over 1988; personal expenditures were twice the amount of business expenditures.

In summary, changes in the composition of tourism demand between 1988 and 1992 were relatively minor, suggesting few changes in tourists' tastes and behaviour. Tourism expenditures in Canada advanced less rapidly than did total personal consumer spending, both in nominal and real terms.

Tourism Supply in Canada⁸

As in the case of the demand estimates, little change was observed in tourism demand as a share of the supply of tourism commodities (Text Table 6.3). In other words, between 1988 and 1992, the change in the components of tourism demand was equivalent to those of supply.

Text Table 6.3

Tourism Share of Domestic Supply

Total Tourism Demand in Canada as a Percentage of Total Domestic Supply

Commodities	1988	1992
Passenger transportation	41.3	41.5
Of which: passenger air transportation	94.5	95.9
Of which: use of private vehicle	22.1	22.0
Accommodation	90.7	89.4
Food and beverages	21.4	21.2
Other tourism commodities ¹	39.7	35.2
Total tourism commodities	37.6	37.3

¹ These include recreation and entertainment as well as travel agency services.

Source: Tourism Satellite Account, 1988 and 1992.

Thus, in both 1988 and 1992, about 37.5% of the combined revenues from passenger transportation, accommodation, food and beverages, recreation and entertainment as well as travel agency services came from tourism.

In the case of passenger transportation, the demand/supply ratio remained essentially the same, at around 41%. Within this major category, the share of revenues from air transportation coming from tourism grew by 1.5 percentage points, reaching 95.9% in 1992⁹.

The largest variation observed between the two years under study was in the category of other tourism commodities,

and was attributable to expenditures on recreational services. The consumption of this type of service by local residents increased proportionally faster than that by tourists.

Tourism GDP¹⁰

The estimates of tourism GDP at factor cost reached \$13.2 billion in 1988 and \$14.2 billion in 1992, 2.4% and 2.3% respectively of GDP for the entire economy. Tourism GDP therefore rose 7.1%,¹¹ an average annual growth of 1.8%. In comparison, the GDP for the overall economy grew at a clearly more accelerated rate, namely 3.0% on average per year. Moreover, with inflation removed, the tourism industry fares more poorly when compared with the total GDP. For example, the average annual growth of the total GDP in real terms is 0.4% between 1988 and 1992, while the tourism aggregate shows negative growth (-2.9%).

Compared with other industries, the tourism GDP grew more rapidly than retail trade, construction and manufacturing industries, but was overshadowed by business services as well as communications.

The GDP changes occurring between 1988 and 1992 differ greatly from industry to industry (*Text Table 6.4*). At 28.9%, the transportation industries accounted for the lion's share of the tourism GDP in 1988, namely \$3.8 billion, of which \$2.5 billion came from labour compensation. This share declined and settled at 25.7% four years later, as the GDP dropped 4.8%. This drop was attributable to the air and railway passenger transportation industries. However, despite the drop of the average value added per job (from \$51,400 in 1988 to \$47,600 in 1992), the values for

transportation remain clearly higher than those for the other industries considered here.

An analysis of the breakdown of the GDP for the transportation industries into its components shows some significant changes between 1988 and 1992. For example, in 1988, the share of labour compensation accounted for 65% of the transportation GDP, while it was at 79% in 1992. This situation stems from the steep decline recorded under operating surplus, which saw its weight drop from 35% in 1988 to 21% in 1992. The air and railway passenger transportation industries contributed to this phenomenon. Moreover, in the case of railway transportation, we note that the share of tourism in the total GDP of the industry declined strongly, from 20% in 1988 to 14% four years later, with passenger transportation taking more of a backseat to the transportation of goods.

While the importance of the transportation industries was reduced in tourism GDP, the reverse happened for the accommodation industries. With a GDP exceeding \$3.4 billion in 1992, these were the second most important among the tourism industries, and the gap separating them from the transportation industries four years earlier was substantially reduced. The average value added per job in accommodation grew 9.5% between 1988 and 1992, to reach \$29,500.

The tourism activity of the food and beverage services industries generated a GDP of \$1.9 billion in 1992, recording a strong increase (16.3%) compared with the previous reference year. Although the average value added per job also grew at a similar rate, its level (\$16,600) remained by far the lowest among the industries under review, being two to three times lower.

Text Table 6.4

Tourism Gross Domestic Product - 1988 and 1992

Industries	Millions of dollars		Total variation %	Relative share %	
	1988	1992	1988 / 1992	1988	1992
Transportation	3,825	3,643	-4.8	28.9	25.7
Accommodation	2,905	3,438	18.3	22.0	24.3
Food services	1,635	1,903	16.4	12.4	13.4
Other tourism industries ¹	1,316	1,391	5.7	10.0	9.8
Total tourism industries	9,682	10,374	7.1	73.2	73.2
Other industries	3,542	3,789	7.0	26.8	26.8
Total tourism activity	13,224	14,163	7.1	100.0	100.0

¹ Includes recreational services and travel agencies.
Source: Tourism Satellite Account, 1988 and 1992.

A significant share (27%) of the tourism GDP is generated from industries that are not considered as tourism industries. The explanation is that approximately one-third of purchases made by tourists are for goods and services such as grocery products, clothing, tobacco products, fuel, vehicle parts and repairs and pre-travel expenditures. This share was the same in 1988 and 1992. Of this 27%, approximately two-fifths stems from the retail trade industry.

Employment and Compensation Generated by Tourism¹²

Tourism activity generated 485,700 jobs in 1992, compared with 482,400 in 1988, a slight average annual increase of 0.2%. By way of comparison, employment across the economy also evolved at a very similar pace. Consequently, the share of tourism employment within the overall economy remained stable between the two reference years, at 3.7%.

In 1992, tourism activity provided 116,400 jobs in the accommodation industries, a slightly higher number than in the food and beverage services industries. This represents an average annual increase of 2.0% in the first case and 0.2% in the second. Four years earlier, the number of jobs within the food and beverage services industry was 6,300 higher than the number in accommodation. In 1992, 76,500 jobs in the transportation industries resulted from tourism activity. For employment, the non-tourism industries benefited the most from tourism activity in 1992, with 122,400 jobs. They were also the most important in 1988.

The average compensation in the transportation industries was \$37,800 in 1992, compared with \$23,200 in the accommodation industries, \$14,000 in the food and beverage services industries, and \$18,700 in the other

tourism industries. With the exception of transportation, these tourism compensation amounts are clearly lower than the average value for all non-tourism activities (\$33,200).

An International Comparison – Selected Countries

It is interesting to compare Canadian results with those in other countries that have a TSA (*Text Table 6.5*). The size of expenditures by non-residents within the total is essentially the same for the countries under consideration, except for New Zealand. In France, the country that receives the largest number of international visitors, the share of expenditures by non-residents reached approximately 35% of the total in 1999. In Canada, the share of expenditures by non-residents remained steady for the two years under study, but increased considerably thereafter. The depreciation of the Canadian dollar in relation to the American dollar during the 90s may also have had an impact from 1992 onward.

The contribution of the tourism GDP to overall economic activity was higher in Canada than in the United States but lower than in New Zealand and in Australia.

For each country, the share of tourism employment in the economy exceeded that of tourism GDP in the total, a reflection of the nature of tourism, which is more labour intensive and pays relatively lower average wages.

Conclusion and Future Work

As may be seen from the results of the Tourism Satellite Account, tourism's importance in the Canadian economy remained significant in 1992, and in a similar proportion to 1988.

Text Table 6.5

International Comparison - Selected Countries

Percent

Variables / Reference Years	Canada			Australia	United States ¹		New Zealand
	1988	1992	2000 ²	1997-98	1992	1997	1994-95
Share of non-residents in total expenditures	22.7	22.3	29.9	22.0	24.0	23.6	47.3
Share of domestic demand in total expenditures	77.3	77.7	70.1	78.0	76.0	76.4	52.7
Share of tourism GDP in total economy	2.4	2.3	2.4	4.5	2.0	2.2	3.4
Share of tourism employment in total employment ³	3.7	3.7	3.5	6.0	3.3	3.5	4.1

¹ According to "method 2".

² According to the *National Tourism Indicators and the Economic Model on the Impact of Tourism*.

³ According to the number of jobs, with the exception of New Zealand, which counts full-time equivalents.

Source: *Tourism Satellite Account, 1988 and 1992*.

The changes with regard to the composition of tourism demand and supply between 1988 and 1992 have proven to be relatively minor, despite the economic recessions in the interim in both Canada and the United States. As for the changes in the tourism industries and their value added created by tourism demand, only the passenger air and rail transportation industries seemed to have experienced relatively significant changes. From this point of view, there are some grounds for claiming that the benefit of more regular updates (annual or biannual) of the TSA would have been relatively negligible during that period.

The work undertaken to establish provincial and territorial estimates for reference year 1996 has opened up another possibility. In addition to incorporating the same strengths as the national TSA and providing the statistical foundations for eventual developments, it is hoped the account will be able to meet the information needs of decision-makers, researchers and the general public. The provincial and territorial estimates are expected to be released in April 2002.

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Notes

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² Tourism, as currently defined, is the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes. Tourism is a demand or consumption-based concept. Moreover, in the Canadian Input-Output accounts, on which the TSA is to a large extent based, tourism does not constitute an industry. Tourism is the sum of its constituent parts, that is some components of industries such as passenger transportation, accommodation, food and beverages as well as recreational services and travel agencies.

³ This refers to expenditures by Canadian residents inside Canada during a trip of 80 kilometres or more (one way). Travel for the purposes of studies, commuting or work in a new location as well as travel by migrants and diplomats or members of the armed forces on posting is excluded.

⁴ Tourism foreign demand, also referred to as tourism exports, represents expenditures made by non-residents in Canada during a trip. The exclusions mentioned in the context of domestic demand also apply.

⁵ In this paper, the average annual variations represent the total variation between 1988 and 1992 divided by four, as annual changes better lend themselves to interpretation. However, the average annual variations can be actually characterised by fluctuations in the years between the two reference periods.

⁶ These mainly include non-tourism goods which are purchased while shopping: groceries, alcoholic beverages purchased at retail, souvenirs, etc. Two types of services (local public transportation and parking) are also included.

⁷ In this article, the term tourist also includes same-day visitors.

⁸ Domestic tourism supply represents the production of tourism commodities by Canadian industries.

- ⁹ The difference between this percentage and full utilisation (100%) is explained by the fact that some expenditures are excluded from the definition of tourism (see note 3).
- ¹⁰ Tourism GDP is the sum of the value added generated by the direct provision of tourism and non-tourism commodities to tourists, whether from tourism industries or others. Only the direct effects of meeting this demand were taken into account. The indirect impacts were set aside. Unless otherwise stated, GDP refers to current or nominal dollars.
- ¹¹ The reader may have noted the difference between the total variation recorded between 1988 and 1992 for total tourism demand, excluding business expenditures (17.3%) and the tourism GDP (7.1%). The following factors explain this gap: (1) *Different conceptual basis*: demand is shown at market prices while the GDP is at factor cost, the difference being net indirect taxes. However, the growth recorded between 1988 and 1992 in the amount of indirect taxes for tourism and non-tourism commodities is very high, stemming partly from the introduction of the Goods and Services Tax. (2) *Imports-related leakage*: the measurement of tourism demand disregards the origin of goods and services (imported or produced domestically) while the GDP takes only domestic production into account. What is more, imports of tourism and non-tourism goods grew considerably between 1988 and 1992. (3) *Changes to the production functions*. (4) *Imperfection of statistical measures*: all statistical estimation contains a certain degree of imperfection, owing to the use of a variety of methodologies and of data sources, for example.
- ¹² The concepts of persons employed and jobs are not theoretically equivalent as an individual, in some cases, could hold more than one job. The employment measure is established regardless of whether people are full- or part-time. Thus, a person working fifteen hours a week will be given the same weight as one working forty hours. We are not dealing with the concept of full-time equivalents here. Labour compensation refers to the net income of unincorporated business as well as labour income.

Appendix 1

Tourism Expenditure by Commodity, 1988

Millions of dollars

Commodities	Business Expenditure in Canada (1)	Personal Expenditure in Canada (2)	Domestic Demand (3)=(1)+(2)	Foreign Demand (Exports) (4)	Total Tourism Demand in Canada (5)=(3)+(4)	Total Domestic Supply (6)	Tourism Share of Total Domestic Supply (7)=(5)/(6)	Canadian Tourism Spending Abroad (Imports) (8)
Passenger air	2,548	2,483	5,031	1,146	6,176	6,538	94.5	1,547
Passenger rail	49	121	170	38	208	239	87.0	90
Passenger water	14	54	68	37	105	118	89.0	188
Interurban, charter and tour bus	44	312	355	56	411	455	90.3	200
Taxis	181	93	274	60	333	1,393	23.9	49
Vehicle rental	237	169	406	169	575	687	83.7	343
Vehicle repairs and parts	269	1,131	1,400	47	1,447	8,896	16.3	90
Vehicle fuel	827	1,947	2,775	265	3,040	11,441	26.6	372
Total Transportation	4,168	6,310	10,478	1,817	12,295	29,767	41.3	2,879
Hotels	1,356	588	1,945	921	2,866	3,169	90.4	1,743
Motels	183	303	485	90	575	603	95.5	289
Camping	--	152	152	33	185	228	81.0	106
Other accommodation	--	145	145	150	295	322	91.6	153
Total accommodation	1,539	1,188	2,727	1,193	3,920	4,321	90.7	2,290
Meals from accommodation	196	302	498	223	721	1,902	37.9	279
Meals from restaurants	680	1,089	1,769	943	2,712	13,690	19.8	1,121
Alcoholic beverages from accommodation	130	193	323	142	464	1,995	23.3	95
Alcoholic beverages from restaurants	157	241	398	194	592	3,314	17.9	156
Meals and alcoholic beverages from other tourism industries	37	57	94	47	141	724	34.2	73
Total food and beverage services	1,200	1,882	3,082	1,548	4,630	21,626	21.4	1,724
Recreation and entertainment	--	1,287	1,287	523	1,810	5,286	34.2	822
Travel agency services	130	327	457	31	488	500	97.6	6
Convention fees	36	18	53	22	76	83	91.3	46
Pre-trip expenditures	--	790	790	--	790	N/A.	N/A.	562
Total other tourism commodities	166	2,421	2,587	576	3,163	N/A.	N/A.	1,436
Groceries	--	1,211	1,211	390	1,601	37,951	4.2	390
Beer, wine & liquor from stores	--	227	227	65	292	8,275	3.5	33
Urban transit & parking	5	39	44	36	80	1,124	7.1	22
Miscellaneous commodities	--	1,635	1,635	838	2,473	N/A.	N/A.	1,019
Total other commodities purchased by tourists	5	3,113	3,118	1,328	4,445	N/A.	N/A.	1,464
Total tourism expenditures	7,077	14,915	21,992	6,462	28,454	N/A.	N/A.	9,793
of which: Taxes					2,911			
Total economy		339,728		163,842				159,118

Appendix 1

Tourism Expenditure by Commodity, 1992

Millions of dollars

Commodities	Business Expenditure in Canada (1)	Personal Expenditure in Canada (2)	Domestic Demand (3)=(1)+(2)	Foreign Demand (Exports) (4)	Total Tourism Demand in Canada (5)=(3)+(4)	Total Domestic Supply (6)	Tourism Share of Total Domestic Supply (7)=(5)/(6)	Canadian Tourism Spending Abroad (Imports) (8)
Passenger air	2,738	3,013	5,752	1,101	6,853	7,148	95.9	2,550
Passenger rail	34	86	120	34	155	170	90.8	148
Passenger water	17	63	80	42	122	141	86.5	309
Interurban, charter and tour bus	61	359	420	87	507	542	93.4	329
Taxis	242	105	347	68	415	1,721	24.1	80
Vehicle rental	268	241	509	267	776	923	84.1	566
Vehicle repairs and parts	313	1,130	1,443	50	1,493	9,439	15.8	148
Vehicle fuel	1,010	2,253	3,262	283	3,546	13,367	26.5	614
Total Transportation	4,683	7,251	11,934	1,933	13,866	33,451	41.5	4,745
Hotels	1,578	824	2,402	1,100	3,502	3,940	88.9	2,872
Motels	317	353	671	137	807	845	95.5	476
Camping	--	189	189	34	223	261	85.5	175
Other accommodation	--	184	184	152	336	399	84.4	252
Total accommodation	1,896	1,550	3,446	1,423	4,869	5,445	89.4	3,774
Meals from accommodation	210	313	523	244	767	1,948	39.3	461
Meals from restaurants	848	1,256	2,104	1,129	3,233	16,468	19.6	1,847
Alcoholic beverages from accommodation	128	179	307	143	450	1,902	23.7	156
Alcoholic beverages from restaurants	194	284	477	245	722	4,051	17.8	257
Meals and alcoholic beverages from other tourism industries	46	65	111	59	169	881	29.2	121
Total food and beverage services	1,425	2,097	3,523	1,819	5,342	25,250	21.2	2,841
Recreation and entertainment	--	1,455	1,455	648	2,103	7,201	29.2	1,355
Travel agency services	179	457	636	43	680	701	97.0	9
Convention fees	53	19	72	30	102	111	91.3	76
Pre-trip expenditures	--	863	863	--	863	N/A.	N/A.	926
Total other tourism commodities	232	2,794	3,026	721	3,748	N/A.	N/A.	2,366
Groceries	--	1,358	1,358	414	1,772	43,427	4.1	643
Beer, wine & liquor from stores	--	245	245	77	322	8,873	3.6	54
Urban transit & parking	6	49	55	43	98	1,418	6.9	36
Miscellaneous commodities	--	2,281	2,281	1,012	3,293	N/A.	N/A.	1,680
Total other commodities purchased by tourists	6	3,933	3,939	1,546	5,485	N/A.	N/A.	2,413
Total tourism expenditures	8,242	17,625	25,867	7,442	33,309	N/A.	N/A.	16,138
of which: Taxes					4,502			
Total economy		412,940		189,783				192,394

Appendix 2

GDP and Employment for Tourism and Non-Tourism Industries, 1988

Industry	Labour income	Net income of unincorporated business	Other operating surplus	GDP at factor cost	Number of jobs	Labour compensation per job	GDP per job	Tourism's share of industry's GDP
	millions of dollars				thousands	dollars	percentage	
Tourism activities:								
Air transportation	1,740	--	500	2,240	46.4	37,500	48,300	70.9
Railway transportation	286	--	386	672	6.7	42,900	100,800	19.7
Water transportation	67	--	18	85	1.7	40,200	51,100	4.9
Bus transportation	196	1	36	233	6.8	29,000	34,300	8.5
Taxicabs	58	56	40	154	9.5	12,000	16,200	29.5
Vehicle rental	86	1	353	441	3.4	25,900	131,100	13.6
Total transportation	2,434	57	1,334	3,825	74.4	33,500	51,400	25.7
Hotels	1,577	43	514	2,134	82.5	19,600	25,900	59.1
Motels	251	64	125	440	13.1	24,100	33,600	72.7
Campgrounds	131	13	19	163	6.8	21,200	24,000	75.0
Other accommodation	101	27	39	168	5.3	24,400	31,900	79.8
Total accommodation	2,060	148	697	2,905	107.6	20,500	27,000	60.2
Food and beverage services	1,250	93	293	1,635	113.9	11,800	14,400	18.2
Recreation & entertainment	680	58	300	1,068	52.2	14,700	20,400	27.9
Travel agencies	194	3	52	248	8.8	22,200	28,100	32.5
Total tourism industry	6,617	388	2,677	9,682	357.0	19,600	27,100	29.0
Other industries	2,479	142	921	3,542	125.4	20,900	28,300	--
Total tourism activities	9,095	531	3,598	13,224	482.4	20,000	27,400	--
Non-tourism activities:								
Agriculture	2,157	3,381	4,305	9,843	500.8	11,100	19,700	--
Fishing and trapping	181	582	340	1,104	38.0	20,100	29,100	--
Logging and forestry	2,231	344	1,385	3,960	68.4	37,700	57,900	--
Mining and oil wells	6,708	93	18,526	25,328	153.7	44,300	164,800	--
Manufacturing	63,891	251	39,496	103,639	2,022.3	31,700	51,200	--
Construction	26,714	3,517	6,310	36,541	895.4	33,800	40,800	--
Transportation and storage	11,362	1,063	6,036	18,461	424.1	29,300	43,500	--
Communications	8,155	89	6,647	14,891	254.1	32,400	58,600	--
Other utilities	4,159	14	13,379	17,552	94.9	44,000	185,000	--
Wholesale trade	20,854	447	7,847	29,147	603.9	35,300	48,300	--
Retail trade	25,045	2,099	5,604	32,747	1,587.2	17,100	20,600	--
Finance, insurance & real estate	23,926	11,620	40,499	76,045	708.4	50,200	107,300	--
Business services	15,274	3,633	3,772	22,680	705.0	26,800	32,200	--
Other industries ¹	105,496	8,712	19,009	133,216	4,486.2	25,500	29,700	--
Total non-tourism activities	316,154	35,845	173,155	525,154	12,542.4	28,100	41,900	--
Total Economy	325,250	36,376	176,753	538,378	13,024.8	27,800	41,300	--
of which: Business sector	241,004	36,376	164,813	442,193	10,171.6	27,300	43,500	--

¹ Including government and non-profit institutions.

Appendix 2

GDP and Employment for Tourism and Non-Tourism Industries, 1992

Industry	Labour income	Net income of unincorporated business	Other operating surplus	GDP at factor cost	Number of jobs	Labour compensation per job	GDP per job	Tourism's share of industry's GDP
	millions of dollars				thousands	dollars	percentage	
Tourism activities:								
Air transportation	2,100	--	-25	2,076	46.4	45,300	44,800	72.2
Railway transportation	244	--	292	536	5.0	48,900	107,300	14.2
Water transportation	89	--	2	92	1.7	52,300	53,800	5.1
Bus transportation	191	1	38	231	7.4	26,100	31,400	7.2
Taxicabs	60	54	53	168	10.2	11,200	16,400	28.8
Vehicle rental	147	1	393	541	5.9	25,200	92,100	15.7
Total transportation	2,832	56	754	3,643	76.5	37,800	47,600	23.2
Hotels	1,945	32	498	2,475	89.5	22,100	27,700	62.0
Motels	306	60	169	535	14.0	26,100	38,200	81.1
Campgrounds	153	24	24	200	6.9	25,400	28,800	80.9
Other accommodation	131	50	47	227	6.0	30,200	38,100	77.7
Total accommodation	2,534	166	738	3,438	116.4	23,200	29,500	60.7
Food and beverage services	1,474	131	298	1,903	114.6	14,000	16,600	18.0
Recreation & entertainment	681	77	304	1,062	46.8	16,200	22,700	25.9
Travel agencies	281	3	45	329	9.0	31,600	36,500	31.7
Total tourism industry	7,801	434	2,139	10,374	363.3	22,700	28,600	27.7
Other industries	2,777	153	860	3,789	122.4	23,900	31,000	--
Total tourism activities	10,578	587	2,998	14,163	485.7	23,000	29,200	--
Non-tourism activities:								
Agriculture	2,634	1,899	5,647	10,180	461.1	9,800	22,100	--
Fishing and trapping	215	471	327	1,013	47.7	14,400	21,200	--
Logging and forestry	2,252	381	894	3,527	61.7	42,700	57,100	--
Mining and oil wells	7,310	119	15,608	23,037	140.5	52,900	164,000	--
Manufacturing	67,455	235	27,048	94,738	1,714.2	39,500	55,300	--
Construction	28,330	3,620	5,162	37,112	858.3	37,200	43,200	--
Transportation and storage	12,736	1,443	5,449	19,628	414.7	34,200	47,300	--
Communications	9,990	108	8,472	18,571	258.3	39,100	71,900	--
Other utilities	5,769	13	15,390	21,171	106.9	54,100	198,100	--
Wholesale trade	23,700	434	6,140	30,274	627.4	38,500	48,300	--
Retail trade	27,544	2,580	3,635	33,760	1,591.2	18,900	21,200	--
Finance, insurance & real estate	29,282	13,678	52,877	95,837	746.6	57,500	128,400	--
Business services	19,790	4,331	3,478	27,599	755.4	31,900	36,500	--
Other industries ¹	140,204	11,228	22,235	173,668	4,814.8	31,500	36,100	--
Total non-tourism activities	377,210	40,541	172,364	590,116	12,598.8	33,200	46,800	--
Total Economy	387,788	41,128	175,363	604,279	13,084.5	32,800	46,200	--
of which: Business sector	274,087	41,128	161,154	476,369	10,005.4	31,500	47,600	--

¹ Including government and non-profit institutions.

CHAPTER 7

REGIONAL PORTRAIT

The Use and Application of *Tourism in Canadian Cities, A Statistical Outlook*

Application of Tourism Statistics
Greater Quebec Area Tourism and Convention Bureau
(OTCCUQ)

The Use and Application of *Tourism in Canadian Cities, A Statistical Outlook*

*Nicolette Douglas,
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Background

Tourism in Canadian Cities, A Statistical Outlook is a special annual report prepared for a Canadian Consortium of Municipal Bureaus of Convention and Tourism. The project began in 1997, when Research Resolutions Ltd. conducted the "Cities" Project for 15 Canadian municipalities using both the Canadian Travel Survey and International Travel Survey for the reference year 1996. In 1998, Statistics Canada took over the project².

*Tourism in Canadian Cities, A Statistical Outlook*¹ is a valuable source of information, and in some instance the only source, for Convention and Visitor Bureau's (CVBs) across Canada to profile visitors to their city. This article will examine how Tourism Vancouver – The Greater Vancouver Convention and Visitors Bureau used the information.

Tourism Vancouver – The Greater Vancouver Convention and Visitors Bureau

Tourism Vancouver works to build the business of over 1,050 members in tourism and related fields. Tourism Vancouver is a marketing organisation which focuses on increasing leisure travel to the Greater Vancouver as well as business travel and encouraging visitors to stay longer and visit more often.

The population of Greater Vancouver Regional District (GVRD) for 2000 is estimated at more than 2 million, almost half of BC's population of 4.1 million. After English and Chinese, the most common mother tongue languages are Punjabi, German, Italian, French, Tagalog (Filipino) and Spanish.

In the past three years Vancouver was voted as one of the top ten "best destinations" in the world by the readers of Condé Nast Traveler magazine. The multi-culturalism in Vancouver's population is also reflected in the mix of origins of overnight visitors to Vancouver.

Tourism Vancouver's use of *Tourism in Canadian Cities, A Statistical Outlook*

Tourism Vancouver has made extensive use of the data in *Tourism in Canadian Cities, A Statistical Outlook*. Initially, however, there were obstacles to overcome. Previously, Tourism Vancouver was using profile data from the 1989 BC Visitor Study. Because *Tourism in Canadian Cities, A Statistical Outlook* provided more current and detailed profile data on an annual basis, Tourism Vancouver decided to adopt this new source. The profile of overnight visitors therefore changed and the research department had to explain this difference to staff, members, customers etc.

Tourism Vancouver used the data to develop four main profile reports on overnight visitors to the GVRD for 1997, 1998 and 1999. These reports are *The Big Picture*, the *Canadian Visitor*, the *American Visitor* and the *International Visitor*.

All four reports contain quarterly profiles on overnight, pleasure, business and business convention visitors as well as those visiting friends and relatives (VFR). The *Canadian* and *American* reports have an additional profile on the *Cultural Visitor*. The *International* report includes profiles on Europe, Asia Pacific, German, French, Japanese, English (UK) and other International visitors.

Each profile depicts visitor volume, market origin, detailed trip expenditures, length of stay, accommodation type, trip purpose, season visited, mode of travel, trip activities, travel party size and composition. The *American* and *International* reports also include information on first time visitors to Canada and rating of services in Canada (compared to their own country).

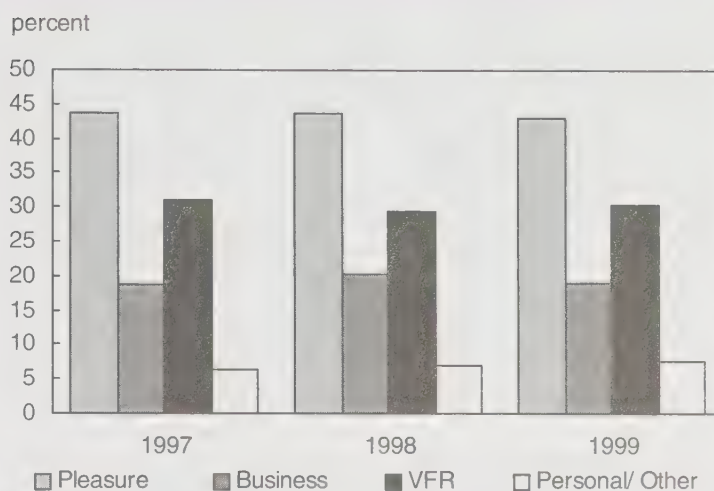
The reports are used by Tourism Vancouver's staff, clients, customers and members as well as students, consultants, government and non-government organisations.

Profile of Overnight Visitors to Greater Vancouver

Pleasure and visiting friends & relatives continue to be the main reasons why overnight visitors travel to Greater Vancouver (73.3%). *Figure 7.1* illustrates that more than 40% of overnight visitors to Greater Vancouver regard themselves as pleasure travellers while about 30% come mainly for visiting friends and relatives.

Figure 7.1

Overnight Visits to GVRD by Trip Purpose, 1997-1999



Source: *Tourism in Canadian Cities, A Statistical Outlook 1997-1999*.

Over 60% of all overnight visitors to GVRD visit during the summer (from April to September). The average length of stay of overnight visitors continues to increase year after year (3 nights in 1997 versus 4 nights in 1999). Over half of all visitors stay 1 to 2 nights and 28% stay 4 to 9 nights. Visitors staying with friends and relatives stay longer, averaging 5 nights per visit. Only 19% of overnight visitors are travelling with children (under 15). Over a third are travelling as a couple and just under a third travel alone.

More than half of the overnight visitors stay in commercial accommodation (hotel, motel, B&B, commercial cottage, camping and trailer park).

Between 1997 and 1999, average spending per travelling party increased for all overnight visitor markets (American, Canadian and International). During the same period, percentage of total spending on accommodation and food and beverages decreased for all markets. Visitor spending on retail goods, recreation & entertainment as well as public and private transportation, as a percentage of total spending, increased for all markets. However, the percentage of visitors using a rental car declined for all markets. Shopping and sightseeing continue to be the main visitor activities, and increased slightly over 1998.

How the Information is Used

Tourism Vancouver's profile reports compare data from 1997 to 1999. The data are also used for comparative analysis – to compare CMAs against other CMAs participating in the project and to determine market share.

These profile reports are an important member benefit and are posted on Tourism Vancouver's extranet. Members can therefore access them at their convenience. Due to high cost, time and expertise required to conduct research of this magnitude, members are unable to compile this data themselves. They therefore rely on the CVB to obtain it.

Members use the data in their business and market development plans, to aid in targeted marketing campaigns and with the strategic focus of their organisation. The profile reports have helped several members to increase their involvement in tourism. The data show them the size and importance of the market segments that they are currently targeting as well as new markets, such as cultural tourism.

Tourism Vancouver's Vancouver Signature Program brings six industry leaders together, including Agfa Film, Air Canada, AT&T Canada, Budget Rent A Car of BC, Diners Club®/enRoute® and Metropolitan Fine Printers. Tourism Vancouver works with the partners to ensure the Vancouver customer receives quality products and services. Where relevant, Tourism Vancouver shares the results with these partners. For instance, Budget Rent A Car of BC is interested in the percentage of overnight visitors that use rental cars and the amount they spend compared to total spending.

Tourism Vancouver's three strategic priorities are Meetings and Events, Leisure Travel and Visitor Servicing. Marketing efforts are targeted towards generating demand for Greater Vancouver hotel rooms, attraction visits, retail goods, sightseeing tours, restaurant meals, event tickets and much more as well as encouraging visitors to stay longer and visit more often³.

Tourism in Canadian Cities, A Statistical Outlook provides information on key measures linked to these strategic priorities - the number of visitor parties and persons, total spending and accommodation spending. The data also track, year over year, trip purpose, visitor activities, visitor spending, length of stay and repeat visitation. This ensures that the strategic focus of the organisation remains relevant and that marketing activities target viable market segments.

Visitors attending conferences, conventions and meetings are an important component of Tourism Vancouver's marketing strategy, as their average spending per day is much higher than that of other overnight visitors. This spending information is used to determine the total direct expenditure of overnight visitors and convention visitors to GVRD. *Text Table 7.1* provides a breakdown of spending per overnight visitor per day 1997-1999. It appears that

spending for the Business convention visitor market has increased in 1999 but their length of stay has decreased compared to 1998. Spending by the Canadian and International business convention visitors has increased and length of stay has also decreased compared to 1998. (*Figure 7.2*).

Spending per person per day by all overnight visitors (Big Picture/Harmonised) has declined, however their length of stay has increased. If one refers to *Figure 7.3*, it is clear that International visitors have the longest length of stay, which is due in part to the distance from Europe and Asia Pacific to the West Coast of Canada.

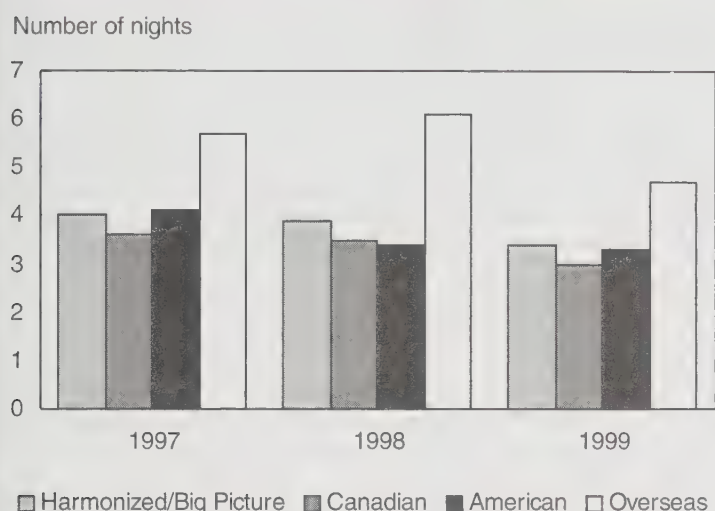
Text Table 7.1

Spending per Overnight Visitor per Day in Greater Vancouver 1997 - 1999

	1997	1998	1999
	dollars		
Harmonized/Big Picture			
Overnight	122	107	101
Pleasure	135	124	113
VFR	n/a	52	49
Business	n/a	204	198
Business Convention	233	204	228
Canadian			
Overnight	65	64	68
Pleasure	78	72	66
VFR	34	33	36
Business	152	162	161
Business Convention	201	152	162
American			
Overnight	146	149	155
Pleasure	140	170	169
VFR	57	59	59
Business	242	235	248
Business Convention	235	226	225
International (overseas)			
Overnight	125	128	127
Pleasure	132	127	131
VFR	81	81	73
Business	171	217	238
Business Convention	210	223	310
Europe	104	118	115
Germany	118	113	107
United Kingdom	108	125	131
France	102	109	170
Asia Pacific	138	127	132
Japan	181	212	191

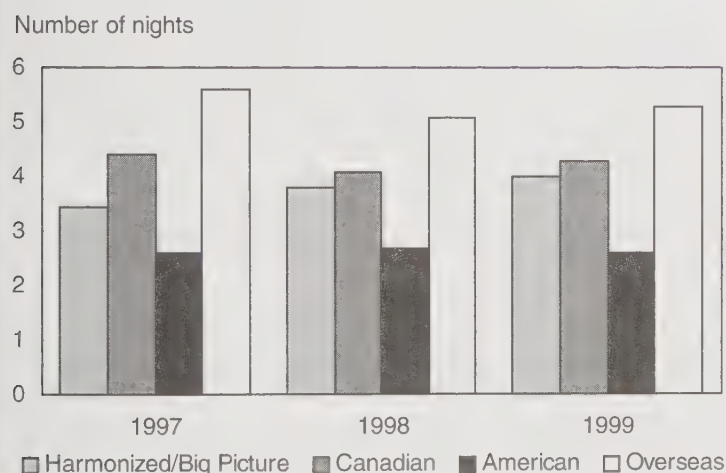
Source: *Tourism in Canadian Cities, A Statistical Outlook 1997-1999*.

Figure 7.2
Average Length of Stay by Market of Origin for Business Convention Visitors to GVRD, 1997-1999



Source: Tourism in Canadian Cities, A Statistical Outlook 1997-1999

Figure 7.3
Average Length of Stay of Overnight Visitors to GVRD by Market of Origin, 1997-1999



Source: Tourism in Canadian Cities, A Statistical Outlook 1997-1999

Tourism in Canadian Cities, A Statistical Outlook provides CVBs with tourism spending information but it doesn't provide information on the total economic impact of this demand. Luc Dubois argues that "the CTS and ITS only allow us to measure the direct impact of tourism demand in a given region, not its total impact. Indeed, the demand for tourism products and services in turn generates demand for numerous inputs, impacting on other sectors of the local economy. In addition, employees of the tourism industry

create demand for other products and services. The total impact can only be measured by taking this multiplier into account⁴."

To determine the economic impact of overnight visitors on the GVRD economy, Tourism Vancouver inputs category-spending data (derived from *Tourism in Canadian Cities*) into the Tourism Economic Assessment Model (developed by the Canadian Tourism Research Institute of the Conference Board of Canada). This information is essential, as it is evidence of the importance of tourism to the broader economy. *Text Table 7.2* provides an example of Spending by category of goods and services.

Text Table 7.2
GVRD Visitor Expenditures by Category of Goods and Services - 1999

Visitor Expenditures	% of spending	Total spending
		thousands
Accommodation	33	1,110,586
Food and beverages (purchased in restaurants and stores)	24	813,697
Retail, Other	18	608,591
Private Transportation	11	356,413
Recreation, Entertainment	10	329,513
Public Transportation	4	144,582
TOTAL	100	3,362,382

Source: Tourism in Canadian Cities, A Statistical Outlook 1999.

The research department developed templates to generate spending profiles of travellers that sales and market development staff (in the Leisure Travel and Meetings and Events department) use to estimate the potential impact of a conference, meeting or tour group. The profiles generated are based on the most recent *Tourism in Canadian Cities, A Statistical Outlook*. The expenditure amounts are then inflated to current prices with the Tourism price index. The multipliers for Industry Output, taxes and employment are derived from multiple runs of the TEAM Model – and are specific to Greater Vancouver.

For example, users insert Information for points 1 to 4. Point 5 is taken from *Tourism in Canadian Cities, A Statistical Outlook*. The impact for a future convention/meeting is then deemed to be based on current year spending. Points 6, 7, 8 and 9 are automatically calculated using the formulas

built into the spreadsheet. All amounts are in Canadian dollars. For an explanation of these calculations, please see endnote⁵.

1. Convention Name	Association of ABC - Annual General Meeting
2. Convention Dates	June 1 - 4 2001
3. Total Number of Delegates	5,000
4. Length of Convention -	Number of nights: 4
5. Average Daily Spending	\$357.70
6. DIRECT SPENDING	\$7,154,000.00
7. INDUSTRY OUTPUT	\$15,524,180.00
8. TAXES	\$3,433,920.00
9. EMPLOYMENT (Jobs)	258

Staff in sales and market development departments rely on Statistics Canada data to profile overnight visitors for their key markets. Within Leisure Travel, there are three major markets, namely the Americas, Europe and Asia Pacific. They also focus on all pleasure travel as well as all visitors from UK, Germany, France and Japan. The Leisure Travel department works with a group of Best Customers (tour operators, cruise lines etc). They track the performance of these customers on an annual basis and are able to compare their individual performance with the overall performance of the market as well as averages. Meetings and Events staff refer to profiles on the business convention visitor in all markets. They reference this information in their presentations to members and customers as well as for internal reports and marketing plans. They use the spending data to estimate visitors' direct spending to an event (as mentioned above) and they reference this figure in their monthly initiative reports.

Tourism Vancouver, along with Calgary Convention & Visitors Bureau, Economic Development Edmonton, Travel Alberta and Tourism Montreal, participated in a partner project to develop a marketing activities evaluation and selection model. The Canadian Tourism Commission participated in the first phase of the project. Arthur Andersen LLP (Vancouver, BC) developed the model and customised it for each partner. The key to the model is that it determines the Return on Investment (ROI) to a CVB for participating in certain marketing activities. Data from *Tourism in Canadian Cities, A Statistical Outlook* was a key component of the model, as it provided spending and length of stay estimate by market origin and visitor type. This is essential in determining the economic impact of visitors generated by a marketing activity.

For example, a sales manager's attendance at a certain event leads to increased visitation (hotel room nights) to the city the CVB is representing, due to the marketing activities of the sales manager at that event. In order to determine total spending that will be generated from the visitors, one would need to know the market origin and trip purpose. The model draws on *Tourism in Canadian Cities, A Statistical Outlook* data to determine the spending of visitors by market origin and trip purpose as well as average length of stay. Return on Investment can then be calculated. A sales manager can then assess which marketing activities provide the best ROI.

Conclusion

Tourism in Canadian Cities, A Statistical Outlook has set new standards. Convention and Visitors Bureaus can now receive comprehensive visitor profile data on an ongoing annual basis. They are also able to compare their profile data to visitor profiles of competitive Canadian cities. For Tourism Vancouver it is a tool to monitor and measure many aspects of tourism activity in Greater Vancouver and across Canada. It is the essential source of visitor profile information.

There is a need among CVBs for comprehensive, timely and accurate visitor data. This need can be met though *Tourism in Canadian Cities, A Statistical Outlook*. However, it is essential for comparative and trend analysis that CVBs or cities participate in the project on an ongoing basis and that the methodology remains consistent.

Notes

¹ Statistics Canada (1999). *Tourism in Canadian Cities, A Statistical Outlook 1997*, Ottawa, Canada: Minister of Industry.

Statistics Canada (1999). *Tourism in Canadian Cities, A Statistical Outlook 1998*, Ottawa, Canada: Minister of Industry.

Statistics Canada (2000). *Tourism in Canadian Cities, A Statistical Outlook 1999*, Ottawa, Canada: Minister of Industry.

² Bonhomme, S (1998). *Canadian Cities – A Tourism Outlook Report Proposal*, Statistics Canada.

³ Tourism Vancouver (2001). *2001 Business & Market Development Plan, Year three of 1999-2003*, Vancouver, Canada.

⁴ Dubois, L (1998). Tourism in Census Metropolitan Areas: New Possibility for Tourism Statistics Program, *Travel-log, Volume 17, Number 1*.

⁵ Explanations of calculations from EXPENDITURE ANALYSIS TEMPLATE FOR BUSINESS CONVENTION VISITORS TO GREATER VANCOUVER:

Direct Spending: Total Number of Delegates Multiplied by Length of Convention Multiplied by Average Daily Spending Equals Direct Spending or
Total Room-nights Multiplied by Average Daily Spending Equals Direct Spending

Industry Output: (Represents the sum total of all economic activity that has taken place due to visitor spending - including initial visitor spending.)

Direct Spending Multiplied by TEAM Multiplier Equals Industry Output

Taxes: (Includes municipal, provincial & federal)

Direct Spending Multiplied by TEAM Multiplier Equals Taxes

Employment (Jobs): Direct Spending Multiplied by TEAM Multiplier Equals Number of jobs

Application of Tourism Statistics Greater Quebec Area Tourism and Convention Bureau (OTCCUQ)

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Introduction

The *Tourism in Canadian Cities* project is enabling the Quebec City region to obtain a very detailed picture of tourism in its area, a picture comparable to what is available on other Canadian destinations. This database constitutes a sound statistical basis for conducting in-depth studies of the regional tourism client base and represents a major tool for selecting and preparing more effective promotion and advertising activities by better targeting tourism client groups.

This article will detail several useful examples of how these statistics are actually being applied in the day-to-day work of OTCCUQ personnel.

Study on the Profile, Behaviour and Perceptions of Tourism Client Groups in the Quebec City Region

In 1999, the Greater Quebec Area Tourism and Convention Bureau (OTCCUQ) conducted a second in-depth study on the tourism client groups that had visited the greater Quebec City area. An initial study, conducted in 1995, had attempted to overcome the lack of information on the behaviour patterns of tourists visiting the Quebec City area. Approximately, 2,845 individuals were interviewed in 1995 on their travel patterns: length of stay, stay expenditures, transportation method used, activities undertaken or sites visited. As well, the results identified tourism products and sites of interest based on the origins of the tourism client group.

The questionnaire for the second survey had to be an almost exact copy of the first survey, with a few changes, in order to provide comparable data and create a statistical series.

The 1999 Study used, this time, the data from the *Tourism in Canadian Cities* project of Statistics Canada. In fact, the results from the Statistics Canada surveys on tourism made it possible to adjust the methodology used in 1995 for the type of accommodation used (commercial accommodation or accommodation with family or friends) and the travel season.

The establishment of the methodological basis for the 1999 survey was based on the type of accommodation used by tourists staying in the Quebec City area. The "Tourism in Canadian Cities" project indicated that 51% had used commercial

accommodation and 49% had stayed with family or friends. Of the 2,541 individuals interviewed in 1999, 1,286 were contacted at random on their departure from their commercial accommodation location (hotel, motel, bed and breakfast, etc.) and 1,255 were contacted by telephone, after being identified in advance by a random survey to identify households in the Quebec City area that had accommodated family or friends from outside the Quebec City area (80 kilometres and over).

The survey extended over the entire 1999 year in order to obtain a reliable and complete picture of the tourism client base. Despite using a survey methodology very different from that of Statistics Canada, the comparative analysis of the results identified some interesting similarities, the most significant of which are set out in the following section.

Comparison of the Results of the OTCCUQ Surveys with those of Statistics Canada

Distribution of the Tourism Client Base

The survey conducted by OTCCUQ indicated a much higher proportion of intra-provincial tourists staying in the Quebec City area (71%) than that obtained from the *Tourism in Canadian Cities* project of Statistics Canada (60%), with the variation affecting the proportion of extra-provincial tourists (6.9% for OTCCUQ against 11.9% for Statistics Canada) and American tourists (8.4% against 14.4%). However, the proportion of overseas tourists was similar: 13.6 % for OTCCUQ against 13.3% for Statistics Canada.

Age of Tourists

The OTCCUQ survey and the *Tourism in Canadian Cities* project of Statistics Canada revealed a fairly similar age distribution of tourists. The average age was 44 for the in-house survey and 44 for Statistics Canada.

Text Table 7.3

Age of Tourists Visiting the Quebec City Area, 1999

Age category	OTCCUQ	Statistics Canada
	percentage	
16 to 24 years	6.9	11.9
25 to 34 years	20.6	21.9
35 to 44 years	28.0	19.0
45 to 54 years	24.8	23.2
55 to 64 years	13.2	13.8
65 years and over	6.5	10.2
Average age (years)	43.9	44.1

Average Stay Expenditures

With regard to the average expenditures by tourists during their stay in the Quebec City region, it may be noted that the OTCCUQ survey assessed these expenditures at \$225 per person as compared to \$251 per person for the Statistics Canada survey. The average stay of tourists in the two studies revealed a certain similarity, even when the origins of the tourists were taken into account.

Text Table 7.4

Average Expenditures Based on the Origins of Tourists Visiting Quebec City, 1999

Origin	OTCCUQ	Statistics Canada
	dollars	
Intra-provincial tourists	170	158
Inter-provincial tourists	321	338
American tourists	348	378
Overseas tourists	348	378
Overall tourists	225	251

As well, the results of the two studies showed some agreement in average stay expenditures based on the travel purpose, except perhaps for visits to family and friends.

Text Table 7.5

Average Expenditures by Travel Purpose of Tourists Visiting Quebec City, 1999

Origin	OTCCUQ	Statistics Canada
	dollars	
Pleasure	259	299
Business	363	394
Visit to family and friends	185	136

Despite these similarities, the two studies remained complementary. The Statistics Canada Study provided a quantitative base, while the OTCCUQ survey focused on the qualitative aspects of tourists' stay, i.e. the information sources and triggers encouraging tourists to come to Quebec City, the satisfaction level for certain tourism attributes of the region and the negative aspects (irritants) of the Quebec City area as a tourism destination.

Other Useful Examples of the Application of Tourism Statistics

The following are some examples illustrating the use of statistical data in various OTCCUQ activities.

Promoting the Industry

Over the years, OTCCUQ has used and distributed statistical data on tourism to better promote the importance of the tourism industry to the regional economy. Thus, close to a billion dollars of expenditures are made annually by tourists, 50% of whom come from outside Canada.

Planning Marketing Activities

The statistics are definitely used by OTCCUQ in preparing its development-marketing plan, its action plan and its annual plan or other public documents.

As well, detailed tourist profiles have been prepared on the basis of activities undertaken or sites visited, thus facilitating the promotion and advertising efforts of industry workers (i.e. profile of tourists who have visited *Vieux-Québec*, the *Place Royale—Petit Champlain* area, the Montmorency Falls, tourists who have taken part in cultural, historical, outdoors activities, etc.)

Moreover, the statistics are used as supports for the sales force when preparing for commercial missions, awards and exhibits and familiarization tours or to provide track record details in order to win a conference. As required, presentations using computer media on statistical data or analyses illustrating a demonstration, so as to maximize the impact of the information disseminated to workers in the field or to multipliers or potential purchasers of the destination.

For example, OTCCUQ media officers used specific statistical profiles of tourists originating from Germany, France or Asia to provide relevant information to foreign journalists, who wanted to write an article on the region. The recent Summit of the Americas, held in Quebec City in April 2001 encouraged journalists to stay several days longer to write an article or produce a special program showcasing the Quebec City area. An information kit showcasing the region and its many attractions was distributed to 1,000

press representatives. This kit highlighted various special features of the Quebec City tourism area, which were illustrated using statistical data.

Informing Our Members and Partners

Every month, OTCCUQ produces a publication entitled **“ECHOtourisme STATistique”** (or more familiarly called **ÉCHOSTAT**), whose purpose is to disseminate various indicators on the “tourism health” of the Quebec City area. The document includes a short profile of the tourists, who have visited the Quebec City area between 1996 and 1999, with the data derived from the “Tourism in Canadian Cities” project of Statistics Canada.

As a supplement to other analyses, surveys and studies conducted by OTCCUQ, the tourism statistics provide considerable assistance in requests for consulting services from various applicants (proponents, consultants, students OTCCUQ members, economic organizations and workers, associations, etc.) from the four corners of the earth.

For example, the upcoming opening of a Marriott hotel in Quebec City follows the presentation of statistical documents on the performance of the tourism sector in the Quebec City area over several years.

Conclusion

Tourism statistics are key and indeed essential to the day-to-day work of the OTCCUQ personnel; they facilitate the choice of promotion and advertising activities, direct the selection of target client groups and influence the development of tourism products. In the short term, OTCCUQ wants to develop a tourism monitoring system, which will be based on the collection of reliable and good quality data, so as to better monitor tourism activities in the various sections of the region.

The *Tourism in Canadian Cities* project represents a constantly developing product and an important source of information on tourism for the Quebec City region and other Canadian destinations. The sustained involvement of the partners in the project can only ensure its success in future years.

CONCLUSION

CONCLUSION

The 2001 Edition of the Tourism Statistical Digest draws a picture of tourism activity in Canada highlighting the main components of the demand and supply of tourism goods and services. Travel by Canadians, international travel to Canada, passenger transportation and tourism services industries, as well as the importance of tourism in the Canadian economy, are all presented.

The introduction of lead articles in the 2001 Edition allowed us to explore the analysis of interesting topics. Economic and social factors, nationally and worldwide that potentially impact tourism have been analysed. Many of these factors will continue to apply and may be even more relevant in the new millenium.

The aging and the growing ethnic diversity of the Canadian population as well as the advances in technology, the globalisation of markets and the porousness of national borders will challenge the tourism industry. The vitality of the sector will depend on the manner in which the stakeholders, marketers, managers and policy makers address these issues in order to take advantage of them and promote the sale of tourism products and services to Canadians as well as international travellers.

FOR FURTHER READING

Selected Publications from Statistics Canada

Title	Catalogue no.
"International Travel – Advance Information" <i>Monthly, Bilingual</i>	66-001-PPB 66-001-XPB
"International Travel – Travel Between Canada and Other Countries" <i>Annual</i>	66-201-XPE 66-201-XPF 66-201-XIE 66-201-XIF
"Travel-Log" <i>Quarterly, Bilingual</i>	87-003-XPB 87-003-XIB
"Canadian Travel Survey; Domestic Travel" <i>Annual, Bilingual</i>	87-212-XPB 87-212-XIE 87-212-XIF
"National Tourism Indicators, Quarterly Estimates" <i>Quarterly, Bilingual</i>	13-009-XPB

See "How to order publication" on the inside cover.

Other Products and Services

Other addition to the selected publications listed above, Statistics Canada publishes a wide range of statistical reports on Canadian economic and social affairs. A comprehensive catalogue of all current publications is available from Statistics Canada, Ottawa (Canada), K1A 0T6 or on our Web site at www.statcan.ca

To order a publication, you may telephone 1 613 951-7277 or use facsimile number 1 613 951-1584. For toll free in Canada only telephone 1 800 700-1033. When ordering by telephone or facsimile a written confirmation is not required.

STATISTICAL TABLES

STATISTICAL TABLES

Symbols

- amount too small to be expressed.
- figures not available.

Table 1.1
World Tourism Growth, 1950-2000 – International Tourist Arrivals

Year	Tourist Arrivals (thousands)						
	World Total	Europe	Americas	East Asia/ Pacific	Africa	Middle East	South Asia
1950	25,282	16,839	7,485	190	524	197	47
1960	69,320	50,351	16,705	704	750	630	180
1970	165,787	113,000	42,273	5,331	2,407	1,864	912
1971	178,853	122,000	44,812	5,645	2,873	2,528	995
1972	189,129	130,000	44,798	6,131	3,400	3,700	1,100
1973	198,906	137,000	46,960	7,096	3,500	3,100	1,250
1974	205,667	140,000	47,730	8,437	3,900	4,300	1,300
1975	222,290	153,859	50,043	8,657	4,654	3,520	1,557
1976	228,873	157,818	51,496	9,636	4,425	3,786	1,712
1977	249,264	170,570	56,379	11,495	4,561	4,203	2,056
1978	267,076	183,543	58,780	13,423	4,912	4,185	2,233
1979	283,089	192,997	59,315	17,463	6,028	5,111	2,175
1980	285,997	186,111	61,368	21,480	7,329	7,467	2,242
1981	287,139	183,998	61,316	23,371	8,185	7,861	2,408
1982	286,097	185,134	58,600	24,535	7,638	7,805	2,385
1983	289,618	187,953	58,885	24,968	8,145	7,217	2,452
1984	316,357	202,276	67,748	27,928	8,812	7,164	2,429
1985	327,188	212,113	64,298	31,105	9,710	7,463	2,499
1986	338,854	214,136	71,428	34,870	9,341	6,395	2,684
1987	363,766	227,458	76,550	40,495	9,833	6,771	2,659
1988	394,825	240,898	83,090	47,020	12,508	8,454	2,855
1989	426,265	266,122	86,993	47,769	13,772	8,569	3,040
1990	457,217	282,744	92,799	54,598	14,959	8,959	3,158
1991	462,682	282,928	95,614	56,442	16,174	8,366	3,258
1992	500,894	302,298	102,257	64,246	18,004	10,507	3,582
1993	515,745	309,944	102,141	71,164	18,451	10,534	3,511
1994	550,252	334,747	104,839	76,788	18,897	11,115	3,866
1995	550,054	323,353	108,939	81,354	19,856	12,352	4,200
1996	597,354	353,725	115,107	89,037	21,777	13,274	4,434
1997	616,213	371,104	116,558	88,254	23,205	14,258	4,834
1998	626,718	373,722	119,487	88,010	24,987	15,293	5,219
1999	650,602	380,271	122,277	97,550	26,509	18,118	5,777
2000	698,353	403,239	129,220	111,925	27,693	19,861	6,415

Source: World Tourism Organization.

Table 1.2
World Tourism Growth, 1950-2000 – International Tourist Receipts

Year	Tourist Receipts ¹ (millions \$US)						
	World Total	Europe	Americas	East Asia/ Pacific	Africa	Middle East	South Asia
1950	2,100	885	1,060	30	88	31	6
1960	6,867	3,884	2,452	195	243	58	35
1970	17,900	11,023	4,800	1,100	482	395	100
1971	20,850	13,327	5,200	1,100	594	429	200
1972	24,621	15,834	6,100	1,171	712	654	150
1973	31,054	20,098	7,400	1,554	909	893	200
1974	33,822	20,982	8,700	1,722	1,072	1,146	200
1975	40,702	25,854	10,219	2,164	1,269	867	329
1976	44,436	27,109	11,581	2,576	1,438	1,223	509
1977	55,637	34,492	12,580	3,583	1,948	2,364	870
1978	68,845	43,763	14,767	4,683	2,130	2,669	833
1979	83,340	52,451	18,230	6,035	2,170	3,669	775
1980	105,320	63,484	25,389	8,720	2,711	3,470	1,546
1981	107,452	59,231	29,168	10,196	2,880	4,123	1,854
1982	100,907	57,793	24,276	10,620	2,702	3,867	1,649
1983	102,474	57,820	24,878	11,182	2,634	4,315	1,645
1984	112,707	59,776	32,157	12,130	2,525	4,593	1,526
1985	118,087	63,516	33,270	13,194	2,543	4,184	1,380
1986	143,455	79,960	38,369	17,153	2,938	3,373	1,662
1987	176,763	100,597	43,003	23,004	3,800	4,524	1,835
1988	204,555	111,988	51,290	30,497	4,585	4,329	1,865
1989	221,433	116,058	60,146	34,243	4,505	4,499	1,982
1990	263,357	143,235	69,196	39,197	5,298	4,402	2,029
1991	276,879	148,531	76,748	40,418	5,030	3,821	2,331
1992	315,422	169,077	83,803	47,844	6,756	5,069	2,773
1993	321,907	163,807	89,088	53,857	6,766	5,706	2,683
1994	354,934	180,950	93,160	63,813	7,491	6,396	3,124
1995	405,997	212,801	99,596	74,538	8,073	7,521	3,468
1996	436,525	222,219	110,612	82,384	9,247	8,246	3,817
1997	439,677	224,469	116,883	75,701	9,397	9,186	4,041
1998	442,986	232,295	117,196	70,698	9,860	8,667	4,270
1999	455,187	233,063	122,396	75,238	10,195	9,720	4,575
2000	475,800	n.a.	137,237	83,748	n.a.	n.a.	5,085

¹ Excluding international fare receipts.

Source: World Tourism Organization.

Table 1.3
Tourism Market Trends – World's Top 40 Tourism Destinations, 1980-1999

International tourist arrivals (excluding same-day visitors)						
1980	Rank 1990	1999	Countries	Arrivals (thousands) 1999	% change 1999/98	% of total 1999
1	1	1	France	73,042	4.1	11.2
2	2	2	United States	48,497	4.3	7.5
3	3	3	Spain	46,776	7.2	7.2
4	4	4	Italy	36,516	4.3	5.6
18	12	5	China	27,047	7.3	4.2
7	7	6	United Kingdom	25,394	-1.4	3.9
6	10	7	Canada	19,465	3.1	3.0
8	8	8	Mexico	19,043	-1.8	2.9
2	17	9	Russian Federation	18,496	14.5	2.8
13	27	10	Poland	17,950	-4.6	2.8
5	6	11	Austria	17,467	0.7	2.7
9	9	12	Germany	17,116	3.5	2.6
10	5	13	Hungary	14,402	-16.7	2.2
16	13	14	Greece	12,164	10.3	1.9
21	14	15	Portugal	11,632	2.9	1.8
28	19	16	China, Hong Kong SAR ³	11,328	10.3	1.7
11	11	17	Switzerland	10,700	-1.9	1.6
20	20	18	Netherlands	9,881	5.7	1.5
27	21	19	Thailand	8,651	9.3	1.3
25	15	20	Malaysia	7,931	30.0	1.2
52	24	21	Turkey	6,893	-30.0	1.1
24	26	22	Ireland	6,403	5.3	1.0
17	22	23	Belgium	6,369	3.0	1.0
22	23	24	Singapore	6,258	10.0	1.0
55	55	25	South Africa	6,026	2.1	0.9
1	16	26	Czech Republic	5,610	2.3	0.9
38	53	27	Brazil	5,107	5.7	0.8
29	34	28	Macau	5,050	10.6	0.8
31	29	29	Tunisia	4,832	2.4	0.7
58	38	30	Indonesia	4,728	2.6	0.7
49	31	31	Korea Republic	4,660	8.8	0.7
39	35	32	Egypt	4,489	28.4	0.7
40	39	33	Norway	4,481	-1.3	0.7
53	36	34	Australia	4,459	6.5	0.7
36	28	35	Japan	4,438	7.5	0.7
-	-	36	Ukraine	4,323	-43.6	0.7
33	25	37	Morocco	3,817	15.1	0.6
-	18	38	Croatia	3,805	-18.2	0.6
19	30	39	Romania	3,209	8.2	0.5
30	33	40	Puerto Rico	3,024	-12.3	0.5
Total 1-40				551,479	3.3	84.8
World Total				650,502	3.7	100.0

¹ Former Czechoslovakia.

² Former USSR.

³ Self-administered region.

Source: World Tourism Organization.

Table 1.4
Tourism Market Trends – World's Top 40 Tourism Earners, 1980-1999

International tourist receipts (excluding international transportation fares)							
1980	Rank 1990	1999	Countries	Receipts (millions \$US) 1999	% change 1999/98	% of total 1999	
1	1	1	United States	74,881	4.8	16.5	
4	4	2	Spain	32,400	7.9	7.1	
2	2	3	France	31,507	5.0	6.9	
3	3	4	Italy	28,359	-5.3	6.2	
5	6	5	United Kingdom	20,223	-3.7	4.4	
6	5	6	Germany	16,730	-0.2	3.7	
34	25	7	China	14,098	10.6	3.1	
7	7	8	Austria	12,533	-0.8	2.8	
10	9	9	Canada	10,171	7.6	2.2	
14	24	10	Greece	8,783	29.5	1.9	
24	15	11	Australia	8,017	8.5	1.8	
9	8	12	Switzerland	7,739	-3.0	1.7	
¹	23	13	Russian Federation	7,510	13.3	1.6	
8	10	14	Mexico	7,223	-3.7	1.6	
19	11	15	China, Hong Kong SAR ³	7,210	-4.0	1.6	
15	14	16	Netherlands	7,092	4.3	1.6	
12	16	17	Belgium	7,039	22.7	1.5	
41	18	18	Korea Republic	6,802	-0.9	1.5	
27	13	19	Thailand	6,695	11.4	1.5	
51	65	20	Poland	6,100	-30.3	1.3	
16	12	21	Singapore	5,974	9.6	1.3	
46	21	22	Turkey	5,203	-50.1	1.1	
21	18	23	Portugal	5,131	-3.3	1.1	
56	26	24	Indonesia	4,710	8.0	1.0	
13	36	25	Brazil	3,994	7.9	0.9	
28	44	26	Egypt	3,903	34.3	0.9	
25	22	27	Sweden	3,894	-7.6	0.9	
18	20	28	Denmark	3,682	12.8	0.8	
23	29	29	Taiwan (Prov. Of China)	3,571	5.6	0.8	
52	31	30	Malaysia	3,540	30.6	0.8	
32	17	31	Japan	3,428	-9.2	0.8	
69	50	32	Hungary	3,394	-3.5	0.7	
37	35	33	Ireland	3,392	3.7	0.7	
²	62	34	Czech Republic	3,035	-22.5	0.7	
20	33	35	India	3,009	2.0	0.7	
26	37	36	Israel	2,974	10.7	0.7	
43	27	37	Argentina	2,812	-2.7	0.6	
48	40	38	Philippines	2,534	4.8	0.6	
31	46	39	South Africa	2,526	-8.4	0.6	
66	49	40	Dominican Rep.	2,524	15.2	0.6	
Total 1-40				394,342	2.8	86.6	
World Total				455,200	2.7	100.0	

¹ Former USSR.

² Former Czechoslovakia.

³ Self-administered region.

Source: World Tourism Organization.

Table 1.5
Tourism Market Trends – World's Top 40 Tourism Spenders, 1980-1999

International tourist payments (excluding international transportation fares)						
1980	Rank 1990	1999	Countries	Payments (millions \$US) 1999	% change 1999/98	% of total 1999
2	1	1	United States	59,351	5.0	15.1
1	2	2	Germany	48,495	3.3	12.3
3	4	3	United Kingdom	35,631	10.4	9.1
6	3	4	Japan	32,808	13.9	8.3
4	5	5	France	18,631	4.7	4.7
13	7	6	Italy	16,913	-4.2	4.3
5	9	7	Netherlands	11,366	3.6	2.9
9	6	8	Canada	11,345	5.4	2.9
-	37	9	China	10,864	18.0	2.8
8	13	10	Belgium	10,057	13.7	2.6
10	8	11	Austria	9,803	3.1	2.5
18	10	12	Sweden	7,557	-2.1	1.9
(1)	-	13	Russian Federation	7,434	-10.2	1.9
11	11	14	Switzerland	6,842	-3.6	1.7
15	15	15	Australia	6,048	12.2	1.5
21	14	16	Taiwan (Prov. Of China)	5,635	11.6	1.4
19	16	17	Spain	5,523	10.3	1.4
16	18	18	Denmark	4,884	9.5	1.2
17	17	19	Norway	4,751	3.1	1.2
31	22	20	Singapore	4,666	74.4	1.2
7	12	21	Mexico	4,541	7.9	1.2
14	24	22	Argentina	4,107	2.9	1.0
34	29	23	Greece	3,989	126.9	1.0
30	19	24	Korea Republic	3,975	50.6	1.0
29	39	25	Poland	3,600	-18.7	0.9
20	23	26	Brazil	3,059	-46.6	0.8
23	27	27	Ireland	2,620	10.4	0.7
25	26	28	Israel	2,566	8.0	0.7
28	32	29	Indonesia	2,353	11.9	0.6
32	30	30	Portugal	2,266	-6.2	0.6
24	20	31	Finland	2,021	-2.0	0.5
26	25	32	Malaysia	1,973	10.5	0.5
33	31	33	Thailand	1,843	27.3	0.5
22	28	34	South Africa	1,806	-2.0	0.5
-	-	35	Ukraine	1,774	-60.4	0.5
(2)	38	36	Czech Republic	1,474	-21.1	0.4
36	35	37	Turkey	1,471	-16.1	0.4
37	43	38	Philippines	1,308	-32.9	0.3
39	36	39	Hungary	1,191	6.8	0.3
27	34	40	Puerto Rico	815	-6.8	0.2
Total 1-40				367,356	4.7	93.4
World Total				393,520	4.1	100.0

(1) Former USSR.

(2) Former Czechoslovakia.

Source: World Tourism Organization.

Table 2.1
Overnight Trips of Canadians by Destination, 1998

	1998			
	Intra-provincial	Inter-provincial	United States	Other Countries
	thousands			
Both sexes	58,609	14,693	13,430	4,218
Under 15 and not stated	10,046	1,919	1,010	276
Male 15 and over	24,441	6,605	6,262	1,895
Female 15 and over	24,122	6,170	6,159	2,046
Age groups	58,609	14,693	13,430	4,218
Under 15	10,046	1,919	2,054	460
15 - 24	8,815	1,807	805	281
25 - 34	10,094	2,584	1,563	580
35 - 44	11,135	3,133	2,372	735
45 - 54	8,743	2,556	2,862	918
55 - 64	5,280	1,475	2,044	701
65 and over	4,496	1,220	1,730	542
Province of origin¹	58,609	14,693	13,430	4,218
Atlantic provinces	4,119	1,960	484	147
Quebec	12,358	2,205	2,272	799
Ontario	22,326	3,795	6,436	2,033
Manitoba & Saskatchewan	5,138	2,136	776	175
Alberta	7,501	2,841	1,102	357
British Columbia ²	7,167	1,756	2,360	707
Primary trip purpose	58,609	14,693	13,430	4,218
Visiting friends or relatives	24,500	5,978	2,627	861
Pleasure	24,009	4,703	7,002	2,392
Business and convention	4,650	2,347	2,563	739
Personal and other reasons	5,450	1,665	1,238	226
Primary transportation mode³	58,609	14,693	13,430	4,218
Air	1,092	4,558	4,603	3,555
Non air	57,517	10,135	8,827	663
Automobile	54,798	9,321	7,605	--
Bus	1,631	433	661	--
Other and not stated	1,087	381	561	--
Party size	58,609	14,693	13,430	4,218
1 person	19,915	5,954	2,505	1,000
2 persons	17,934	4,784	5,815	2,025
3 persons	7,516	1,467	1,473	387
4 persons	8,956	1,594	1,968	450
5 or more persons	4,288	894	1,670	355
Party composition	58,609	14,693	13,430	4,218
1 adult	19,915	5,954	2,364	967
2 adults	15,982	4,269	5,874	2,032
3 or more adults	2,276	500	2,558	734
Total - adults only (15+)	38,173	10,723	10,795	3,734
1 adult with children	4,796	941	243	69
2 adults with children	13,633	2,590	1,522	266
3 adults or more with children	2,007	439	867	148
Total - adults with children	20,436	3,971	2,632	483
Child(ren) travelling alone	-	-	3	1

Table 2.1
Overnight Trips of Canadians by Destination, 1998 – Concluded

	1998			
	Intra-provincial	Inter-provincial	United States	Other Countries
	thousands			
Trip duration	58,609	14,693	13,430	4,218
1 - 3 nights	47,778	7,640	6,568	93
4 - 6 nights	6,731	3,298	2,723	259
7 - 9 nights	2,271	1,520	1,915	1,257
10 - 13 nights	892	931	805	484
14 - 20 nights	715	889	770	1,159
21 or more nights	223	415	649	966
Survey quarter	58,609	14,693	13,430	4,218
1st quarter (Jan.-Mar.)	9,258	2,258	3,040	1,395
2nd quarter (Apr.-June)	13,717	3,431	3,531	927
3rd quarter (July-Sept.)	23,201	5,793	4,166	1,035
4th quarter (Oct.-Dec.)	12,432	3,211	2,693	862
Accommodation (person-nights)	161,898	79,617	99,858	72,154
Hotel/Motel	23,543	14,696	32,995	23,335
Camping or trailer park	18,507	4,559	7,345	157
Cottages (commercial/private)	28,138	3,999	3,207	368
Home of friends/relatives	70,654	34,251	12,925	12,690
Other only	9,212	2,861	8,772	3,040
Combinations of two or more	11,845	19,251	34,614	32,564
Reported trip expenditures (\$)				
Total expenditures	7,871,403	7,264,307	10,836,375	10,963,967
Accommodation	1,932,298	1,418,289	3,040,441	2,081,686
Transportation ⁴	2,264,518	3,583,293	3,925,025	6,036,856
Food and beverage	2,118,768	1,374,111	1,845,084	1,449,244
Recreation & entertainment	583,993	333,936	946,174	601,925
Other (clothing, souvenirs, etc.)	971,827	554,678	1,079,652	794,257
Activities (multiple counts)				
Visiting friends or relatives	61,495	16,242	5,226	1,973
Shopping	15,675	5,534	8,650	3,367
Sightseeing	12,284	5,351	6,012	3,285
Attending a festival, fair or exhibition	2,446	974	1,188	627
Attending cultural events (plays, concerts)	1,837	649	1,390	916
Attending sports event	3,494	1,070	1,242	268
Visiting a zoo, museum, natural display	3,349	2,188	2,224	1,573
Visiting a theme park	1,449	963	1,362	365
Visiting a national/provincial park or historic site	3,660	1,922	2,680	1,776
Enjoying nightlife and entertainment	5,220	2,287	7,756	4,018
Participating in sports /outdoor activity	23,764	4,916	5,172	2,097
Swimming	9,298	1,892	3,097	1,720
Other water-based activities	5,325	931	565	732
Hunting or fishing	4,764	544	191	74
Cross-country skiing	466	57	35	4
Downhill skiing	1,003	327	228	18
Other sports or outdoor activities	5,076	963	3,299	808

-- Amount too small to be expressed.

¹ Province of residence for foreign destinations.

² For Us and Overseas includes Yukon and NWT.

³ Allocation of trips by mode of transportation is based on the volume of Canadians returning from countries other than the United States by type of transportation.

⁴ Transportation Spending for U.S. and other countries destination includes international fares paid to foreign and Canadian carriers. Total expenditures were reallocated according to the proportion of expenditures reported in detail.

Sources: Canadian Travel Survey and International Travel Survey.

Table 2.2
Distribution of Overnight Trips of Canadians by Destination, 1998

	1998			
	Intra-provincial	Inter-provincial	United States	Other Countries
	%			
Both sexes	100	100	100	100
Under 15 and not stated	17	13	8	7
Male 15 and over	42	45	47	45
Female 15 and over	41	42	46	49
Age groups	100	100	100	100
Under 15	17	13	15	4
15 - 24	15	12	6	7
25 - 34	17	18	12	14
35 - 44	19	21	18	17
45 - 54	15	17	21	22
55 - 64	9	10	15	17
65 and over	8	8	13	13
Province of origin¹	100	100	100	100
Atlantic provinces	7	13	4	3
Quebec	21	15	17	19
Ontario	38	26	48	48
Manitoba & Saskatchewan	9	15	6	4
Alberta	13	19	8	8
British Columbia ²	12	12	18	17
Primary trip purpose	100	100	100	100
Visiting friends or relatives	42	41	20	20
Pleasure	41	32	52	57
Business and convention	8	16	19	18
Personal and other reasons	9	11	9	5
Primary transportation mode³	100	100	100	100
Air	2	31	34	84
Non air	98	69	66	16
Automobile	93	63	57	--
Bus	3	3	5	--
Other and not stated	2	3	4	--
Party size	100	100	100	100
1 person	34	41	19	24
2 persons	31	33	43	48
3 persons	13	10	11	9
4 persons	15	11	15	11
5 or more persons	7	6	12	8
Party composition	100	100	100	100
1 adult	34	41	16	21
2 adults	27	29	40	45
3 or more adults	4	3	18	16
Total - adults only (15+)	65	73	74	83
1 adult with children	8	6	2	2
2 adults with children	23	18	10	6
3 adults or more with children	3	3	6	3
Total - adults with children	35	27	18	11
Child(ren) travelling alone	-	-	--	--

Table 2.2

Distribution of Overnight Trips of Canadians by Destination, 1998 – Concluded

	1998			
	Intra-provincial	Inter-provincial	United States	Other Countries
	%			
Trip duration	100	100	100	100
1 - 3 nights	82	52	49	2
4 - 6 nights	11	22	20	6
7 - 9 nights	4	10	14	30
10 - 13 nights	2	6	6	11
14 - 20 nights	1	6	6	27
21 or more nights	--	3	5	23
Survey quarter	100	100	100	100
1st quarter (Jan.-Mar.)	16	15	23	33
2nd quarter (Apr.-June)	23	23	26	22
3rd quarter (July-Sept.)	40	39	31	25
4th quarter (Oct.-Dec.)	21	22	20	20
Accommodation (person-nights)	100	100	100	100
Hotel/Motel	16	18	35	28
Camping or trailer park	13	6	8	--
Cottages (commercial/private)	18	5	3	1
Home of friends/relatives	46	43	13	20
Other only	3	4	8	4
Combinations of two or more	7	24	34	47
Reported trip expenditures (\$)				
Total expenditures	100	100	100	100
Accommodation	25	20	28	19
Transportation ⁵	9	49	36	55
Food and beverage	27	19	17	13
Recreation & entertainment	7	5	9	5
Other (clothing, souvenirs, etc.)	12	8	10	7
Activities list (multiple counts)				
Visiting friends or relatives ⁴	52	56	39	47
Shopping	27	38	64	80
Sightseeing	21	36	45	78
Attending a festival, fair or exhibition	4	7	9	15
Attending cultural events (plays, concerts)	3	4	10	22
Attending sports event	6	7	9	6
Visiting a zoo, museum, natural display	6	17	17	37
Visiting a theme park	2	7	10	9
Visiting a national/provincial park or historic site	6	13	20	42
Enjoying nightlife and entertainment	9	16	58	44
Participating in sports /outdoor activity	41	33	39	50
Swimming	16	13	23	41
Other water-based activities	9	6	4	17
Hunting or fishing	8	4	1	2
Cross-country skiing	1	--	--	--
Downhill skiing	2	2	2	--
Other sports or outdoor activities	9	7	19	--

-- Amount too small to be expressed.

¹ Province of residence for foreign destinations.² For U.S. and Overseas includes Yukon and NWT.³ Allocation of trips by mode of transportation is based on the volume of Canadians returning from countries other than the United States by type of transportation.⁴ For intra and interprovincial trips average of percentage of travellers visiting friends and visiting relatives, two different activities in the CTS.⁵ Transportation Spending for U.S. and other countries destination includes international fares paid to foreign and Canadian carriers. Total expenditures were reallocated according to the proportion of expenditures reported in detail.

Sources: Canadian Travel Survey and International Travel Survey.

Table 2.3
Overnight Trips of Canadians by Destination, 1999

	1999			
	Intra-provincial	Inter-provincial	United States	Other Countries
	thousands			
Both sexes	58,491	14,966	14,116	4,252
Under 15 and not stated	9,521	1,911	1,145	374
Male 15 and over	24,849	6,797	6,518	1,864
Female 15 and over	24,121	6,258	6,452	2,014
Age groups	58,491	14,966	14,116	4,252
Under 15	9,521	1,911	2,200	549
15 - 24	8,385	2,091	859	275
25 - 34	9,797	2,538	1,607	554
35 - 44	11,304	3,038	2,489	707
45 - 54	9,222	2,579	2,888	913
55 - 64	5,487	1,467	2,267	745
65 and over	4,774	1,343	1,806	509
Province of origin¹	58,491	14,966	14,116	4,252
Atlantic provinces	4,259	1,915	533	144
Quebec	12,667	2,314	2,529	863
Ontario	22,075	3,951	6,667	2,050
Manitoba & Saskatchewan	5,064	2,145	778	164
Alberta	7,286	2,967	1,162	332
British Columbia ²	7,141	1,675	2,478	702
Primary trip purpose	58,491	14,966	14,116	4,252
Visit friends or relatives	23,792	6,262	2,755	752
Pleasure	24,772	4,808	7,365	2,544
Business	4,285	2,201	2,685	684
Personal and other reasons	5,642	1,696	1,311	272
Primary transportation mode³	58,491	14,966	14,116	4,252
Air	1,095	4,425	4,962	3,627
Non air	57,396	10,541	9,154	624
Automobile	54,716	9,681	7,869	--
Bus	1,707	433	694	--
Other and not stated	973	426	591	--
Party size	58,491	14,966	14,116	4,252
1 person	20,113	6,293	2,760	1,074
2 persons	18,876	4,650	6,117	2,011
3 persons	7,087	1,568	1,490	381
4 persons	8,590	1,729	2,150	432
5 or more persons	3,825	726	1,600	354
Party composition	58,491	14,966	14,116	4,252
1 adult	20,113	6,293	2,607	1,035
2 adults	16,782	4,234	6,177	2,034
3 or more adults	1,925	505	2,698	710
Total - adults only (15+)	38,820	11,032	11,482	3,779
1 adult with children	4,406	930	227	69
2 adults with children	13,210	2,619	1,570	258
3 adults or more with children	2,055	384	831	145
Total - adults with children	19,671	3,934	2,628	472
Child(ren) Travelling Alone	-	-	6	1

Table 2.3
Overnight Trips of Canadians by Destination, 1999 – Concluded

	1999			
	Intra-provincial	Inter-provincial	United States	Other Countries
	thousands			
Trip duration	58,491	14,966	14,116	4,252
1 - 3 nights	48,093	7,801	7,064	79
4 - 6 nights	6,792	3,278	2,874	293
7 - 9 nights	2,042	1,624	2,049	1,466
10 - 13 nights	635	984	816	448
14 - 20 nights	661	832	671	1,116
21 or more nights	268	448	641	849
Survey quarter	58,491	14,966	14,116	4,252
1st quarter (Jan.-Mar.)	10,319	2,750	2,883	1,461
2nd quarter (Apr.-June)	14,592	3,232	3,534	949
3rd quarter (July-Sept.)	22,508	5,929	4,704	987
4th quarter (Oct.-Dec.)	11,072	3,056	2,994	855
Accommodation (person-nights)	158,817	81,395	99,909	69,585
Hotel/Motel	23,063	15,228	34,481	23,227
Camping or trailer park	16,694	5,219	7,036	71
Cottages (commercial/private)	29,953	4,556	3,199	188
Home of friends/relatives	70,501	35,033	14,020	12,317
Other only	9,975	3,713	7,767	3,134
Combinations of two or more	8,631	17,646	33,405	30,648
Reported trip expenditures (\$)				
Total expenditures	8,078,421	7,634,784	11,725,787	11,148,012
Accommodation	1,956,149	1,510,142	3,235,347	2,123,917
Transportation ⁴	2,302,284	3,840,235	4,401,933	6,149,269
Food and beverage	2,172,010	1,398,293	1,974,506	1,469,547
Recreation & entertainment	590,646	383,420	957,984	618,680
Other (clothing, souvenirs, etc.)	1,057,331	502,695	1,156,018	786,598
Activities list (multiple counts)				
Visiting friends or relatives	61,021	16,623	5,269	1,870
Shopping	15,499	5,430	8,950	3,311
Sightseeing	12,177	5,523	6,483	3,294
Attending a festival, fair or exhibition	2,361	867	1,188	526
Attending cultural events (plays, concerts)	1,705	761	1,415	946
Attending sports event	3,438	1,075	1,063	245
Visiting a zoo, museum, natural display	986	839	2,184	1,573
Visiting a theme park	1,214	810	1,399	316
Visiting a national/provincial park or historic site	3,675	1,830	2,851	1,720
Enjoying nightlife and entertainment	5,612	2,405	8,407	2,331
Participating in sports /outdoor activity	23,823	5,198	5,231	2,164
Swimming	9,138	1,766	3,223	1,756
Other water-based activities	5,499	818	600	756
Hunting or fishing	4,468	561	179	70
Cross-country skiing	268	118	30	7
Downhill skiing	991	390	202	19
Other sports or outdoor activities	4,760	1,078	2,270	630

¹ Province of residence for foreign destinations.

² For U.S. and Overseas includes Yukon and NWT.

³ Allocation of trips by mode of transportation is based on the volume of Canadians returning from countries other than the United States by type of transportation.

⁴ Transportation Spending for U.S. and other countries destination includes international fares paid to foreign and Canadian carriers. Total expenditures were reallocated according to the proportion of expenditures reported in detail.

Sources: Canadian Travel Survey and International Travel Survey.

Table 2.4
Distribution of Overnight Trips of Canadians by Destination, 1999

	1999			
	Intra-provincial	Inter-provincial	United States	Other Countries
	%			
Both sexes	100	100	100	100
Under 15 and not stated	16	13	8	9
Male 15 and over	42	45	46	44
Female 15 and over	41	42	46	47
Age groups	100	100	100	100
Under 15	16	13	16	13
15 - 24	14	14	6	6
25 - 34	17	17	11	13
35 - 44	19	20	18	17
45 - 54	16	17	20	21
55 - 64	9	10	16	18
65 & over	8	9	13	12
Province of origin¹	100	100	100	100
Atlantic provinces	7	13	4	3
Quebec	22	15	18	20
Ontario	38	26	47	48
Manitoba & Saskatchewan	9	14	6	4
Alberta	12	20	8	8
British Columbia ²	12	11	18	17
Primary trip purpose	100	100	100	100
Visiting friends or relatives	41	42	20	18
Pleasure	42	32	52	60
Business and convention	7	15	19	16
Personal and other reasons	10	11	9	6
Primary transportation mode²	100	100	100	100
Air	2	30	35	85
Non air	98	70	65	15
Automobile	94	65	56	--
Bus	3	3	5	--
Other and not stated	2	3	4	--
Party size	100	100	100	100
1 person	34	42	20	25
2 persons	32	31	43	47
3 persons	12	10	11	9
4 persons	15	12	15	10
5 or more persons	7	5	11	8
Party composition	100	100	100	100
1 adult	34	42	18	24
2 adults	29	28	44	48
3 or more adults	3	3	19	17
Total - adults only (15+)	66	74	81	89
1 adult with children	8	6	2	2
2 adults with children	23	17	11	6
3 adults or more with children	4	3	6	3
Total - adults with children	34	26	19	11
Child(ren) travelling alone	-	-	--	--

Table 2.4
Distribution of Overnight Trips of Canadians by Destination, 1999 – Concluded

	1999			
	Intra-provincial	Inter-provincial	United States	Other Countries
	thousands			
Trip duration	100	100	100	100
1 - 3 nights	82	52	50	2
4 - 6 nights	12	22	20	7
7 - 9 nights	3	11	15	34
10 - 13 nights	1	7	6	11
14 - 20 nights	1	6	5	26
21 or more nights	--	3	5	20
Survey quarter	100	100	100	100
1st quarter (Jan.-Mar.)	18	18	20	34
2nd quarter (Apr.-June)	25	22	25	22
3rd quarter (July-Sept.)	38	40	33	23
4th quarter (Oct.-Dec.)	19	20	21	20
Accommodation (person-nights)	100	100	100	100
Hotel/Motel	15	19	35	33
Camping or trailer park	11	6	7	--
Cottages (commercial/private)	19	6	3	--
Home of friends/relatives	44	43	14	18
Other only	6	5	8	5
Combinations of two or more	5	22	33	44
Reported trip expenditures (\$)				
Total expenditures	100	100	100	100
Accommodation	24	20	28	19
Transportation ⁴	28	50	38	55
Food and beverage	27	18	17	13
Recreation & entertainment	7	5	8	6
Other (clothing, souvenirs, etc.)	13	7	10	7
Activities list (multiple counts)				
Visiting friends or relatives	104	111	37	44
Shopping	26	36	63	78
Sightseeing	21	37	46	77
Attending a festival, fair or exhibition	4	6	8	12
Attending cultural events (plays, concerts)	3	5	10	22
Attending sports event	6	7	8	6
Visiting a zoo, museum, natural display	2	6	15	37
Visiting a theme park	2	5	10	7
Visiting a national/provincial park or historic site	2	12	20	40
Enjoying nightlife and entertainment	10	16	24	44
Participating in sports /outdoor activity	41	35	37	51
Swimming	1	12	23	41
Other water-based activities	9	5	4	18
Hunting or fishing	8	4	1	2
Cross-country skiing	--	1	--	--
Downhill skiing	2	3	1	--
Other sports or outdoor activities	8	7	24	20

-- Amount too small to be expressed.

¹ Province of residence for foreign destinations.

² For U.S. and Overseas includes Yukon and NWT.

³ Allocation of trips by mode of transportation is based on the volume of Canadians returning from countries other than the United States by type of transportation.

⁴ Transportation Spending for U.S. and other countries destination includes international fares paid to foreign and Canadian carriers. Total expenditures were reallocated according to the proportion of expenditures reported in detail.

Sources: Canadian Travel Survey and International Travel Survey.

Table 2.5
Characteristics of Overnight Visits of Canadians by Top Destinations, 1998 and 1999

Destination	Person-visits		Person-nights		Reallocated expenditures ¹	
	1998	1999	1998	1999	1998	1999
	thousands		thousands		thousands \$	
Canada	75,446	75,507	240,878	239,349	15,095,873	15,660,508
Ontario	25,547	25,467	76,012	74,868	4,664,606	4,735,100
Quebec	15,135	15,741	44,833	46,062	2,670,739	2,894,880
Alberta	10,224	9,907	31,294	30,007	2,250,232	2,223,657
British Columbia	9,868	9,961	39,931	40,759	2,657,566	2,951,952
Saskatchewan	4,337	4,260	13,679	12,721	625,574	623,422
Nova Scotia	2,901	3,050	9,999	9,646	659,198	656,377
Manitoba	3,189	2,917	9,625	9,484	604,145	606,591
New Brunswick	2,189	2,253	6,942	7,689	406,285	437,427
Newfoundland	1,379	1,316	5,499	5,320	367,716	350,491
Prince Edward Island	599	565	2,407	2,347	150,389	155,959
Yukon/Northwest Territories	80	69	658	446	39,424	24,651
Countries						
United States	13,431	14,116	99,858	99,909	7,902,214	8,401,013
United Kingdom	816	816	10,688	10,037	947,007	1,009,343
Mexico	597	608	6,751	6,540	545,665	556,894
France	452	408	5,498	4,576	499,569	506,211
Germany	252	228	2,668	2,044	219,548	183,271
Cuba	181	350	1,605	3,107	143,438	264,590
Italy	194	192	2,276	2,388	225,574	282,611
Netherland	174	154	1,609	1,327	104,933	106,631
Hong Kong	119	115	1,802	1,916	158,966	138,313
Dominican Republic	140	153	1,265	1,402	100,653	121,568
Switzerland	142	108	1,005	855	108,989	91,035
States						
New York	2,209	2,283	6,619	5,893	670,553	631,255
Florida	1,720	1,690	32,999	32,529	1,821,507	1,788,380
Washington	1,541	1,644	4,451	4,565	260,204	261,632
Michigan	1,205	1,232	2,947	3,035	216,462	233,626
California	973	1,044	8,005	7,924	827,049	917,581
Maine	595	661	1,950	2,118	128,261	147,325
Vermont	552	557	1,703	1,694	88,319	86,718
Nevada	694	682	3,241	3,121	470,101	502,099
Pennsylvania	561	644	1,372	1,613	115,222	164,580
Montana	426	444	1,421	1,427	86,128	90,573

Sources: Canadian Travel Survey and International Travel Survey.

¹ For foreign destination excludes international transportation fares.

Table 2.6
Travel Participation Rates of Canadians for Overnight Non-Business Trips, 1998

	1998				
	Total	Intra-provincial	Inter-provincial	United States	Other Countries
	%				
Province of residence	66	52	21	15	7
Newfoundland	73	67	22	5	2
Prince Edward Island	64	21	56	6	--
Nova Scotia	67	52	32	10	5
New Brunswick	65	52	39	10	3
Quebec	57	48	11	10	6
Ontario	65	52	15	18	9
Manitoba	67	43	34	18	4
Saskatchewan	80	67	47	10	5
Alberta	75	57	39	18	7
British Columbia	71	56	25	20	10
Age groups	66	52	21	15	7
15 - 24	69	56	19	13	7
25 - 34	68	58	22	14	6
35 - 44	69	56	23	17	7
45 - 54	68	53	24	18	8
55 - 64	64	49	22	17	10
65 and over	51	37	15	13	7
Both sexes	66	52	21	15	7
Male 15 and over	66	53	22	16	7
Female 15 and over	65	52	20	15	8
Educational attainment	66	52	21	15	7
0-8 years	41	32	9	6	4
Some secondary education	57	45	15	10	5
Graduated from high school	64	50	20	14	6
Some post-secondary	69	57	23	14	7
Post-secondary certificate/diploma	72	58	23	16	8
University degree	82	65	33	27	15
Marital status	66	52	21	15	7
Married or common-law	68	55	23	17	8
Single, never married	64	51	19	12	7
Widowed	47	35	11	11	4
Separated or divorced	61	49	18	13	6
Household income	66	52	21	15	7
Not stated	58	46	16	12	7
Less than \$20,000	47	38	12	6	3
\$20,000 - \$39,999	59	47	17	10	4
\$40,000 - \$59,999	72	57	24	16	7
\$60,000 - \$79,999	78	61	26	19	10
\$80,000 and over	87	70	34	34	17
Type of occupation	66	52	21	15	7
Managerial & other professional	82	66	31	24	12
Clerical /sales /service	69	56	22	15	7
Primary occupations	63	50	21	13	4
Manufacturing/construction/transport	63	51	19	11	5
Never worked/ none of the above	53	41	15	11	6

Source: Canadian Travel Survey.

Table 2.7
Travel Participation Rates of Canadians for Overnight Non-Business Trips, 1999

	1999				
	Total	Intra-provincial	Inter-provincial	United States	Other Countries
	%				
Province of residence	64	50	20	14	8
Newfoundland	67	61	15	2	2
Prince Edward Island	68	23	57	8	2
Nova Scotia	65	50	30	10	6
New Brunswick	65	47	35	10	3
Quebec	58	48	12	9	7
Ontario	62	49	15	18	9
Manitoba	64	44	35	16	4
Saskatchewan	80	67	40	9	4
Alberta	70	56	36	12	5
British Columbia	71	53	23	19	11
Age groups	64	50	20	14	8
15 - 24	67	53	19	12	5
25 - 34	67	54	22	15	8
35 - 44	68	53	21	15	8
45 - 54	67	52	22	17	9
55 - 64	62	49	20	15	9
65 and over	51	38	15	11	6
Both sexes	64	50	20	14	8
Male 15 and over	66	52	20	14	8
Female 15 and over	63	49	20	15	7
Educational attainment	64	50	20	14	8
0-8 years	38	28	9	5	3
Some secondary education	58	46	15	9	5
Graduated from high school	63	49	17	13	7
Some post-secondary	70	54	22	15	8
Post-secondary certificate/diploma	70	56	23	15	7
University degree	79	61	33	27	15
Marital status	64	50	20	14	8
Married or common-law	67	53	22	16	9
Single, never married	62	49	19	12	6
Widowed	49	36	16	7	4
Separated or divorced	58	45	16	11	6
Household income	64	50	20	14	8
Not stated	52	38	16	11	6
Less than \$20,000	42	32	12	5	3
\$20,000 - \$39,999	58	46	16	9	5
\$40,000 - \$59,999	72	56	23	15	8
\$60,000 - \$79,999	77	61	24	17	10
\$80,000 and over	82	65	30	31	14
Type of occupation	64	50	20	14	8
Managerial & other professional	79	62	30	23	12
Clerical /sales /service	67	53	21	14	6
Primary occupations	63	49	16	10	6
Manufacturing/construction/transport	64	54	21	8	5
Never worked/ none of the above	51	39	14	10	6

Source: Canadian Travel Survey.

Table 3.1

International Visitors to Canada by Transportation Mode or Type of Entry, 1990-1999

Type of entry	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
thousands of person-trips										
Total	37,987	37,493	35,721	36,092	38,643	41,649	43,256	45,076	48,064	49,055
Residents of United States	34,735	34,258	32,426	32,623	34,859	37,330	38,471	40,490	43,857	44,630
Same-day	22,482	21,575	20,609	20,599	22,316	24,325	25,563	27,089	28,965	29,450
Automobile	20,692	19,809	19,019	19,013	20,667	22,746	23,804	25,252	27,062	27,318
Bus	720	1,371	723	768	831	858	896	968	949	997
Other	1,070	619	632	594	608	646	626	728	770	1,135
One or more nights	12,252	12,003	11,819	12,024	12,542	13,005	12,909	13,401	14,893	15,180
Automobile	8,381	8,366	8,264	8,260	8,643	8,702	8,325	8,399	9,402	9,609
Air, commercial	2,439	2,291	2,331	2,522	2,574	2,924	3,287	3,439	3,907	4,108
Air, private	98	102	98	93	102	105	125	159	180	177
Bus	722	680	665	674	741	749	772	813	804	810
Rail	62	62	64	62	70	78	78	91	104	116
Marine, commercial	662	642	374	377	372	283	329	379	409	492
Marine, private	305	316	256	260	251	239	230	261	270	259
Residents of other countries	3,252	3,235	3,295	3,469	3,784	4,319	4,785	4,586	4,207	4,425
Direct	1,563	1,585	1,618	1,768	1,957	2,221	2,454	2,557	2,496	2,606
Air	1,563	1,585	1,618	1,768	1,957	2,221	2,446	2,550	2,490	2,599
Via United States	1,689	1,650	1,677	1,701	1,827	2,098	2,331	2,030	1,710	1,819
Air	629	582	590	598	658	742	826	848	829	992
Land, same-day	266	302	356	365	334	364	365	319	229	194
Land, one or more nights	758	729	698	698	798	958	1 096	813	600	568
Marine	36	37	33	40	37	34	44	50	52	65

Source: International Travel Survey, 1990-1999.

Table 3.2
International Visitors to Canada by Region of Residence, Overnight Trips, 1990-1999

Region of residence	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
thousands of person-trips										
Total	15,210	14,913	14,741	15,105	15,972	16,932	17,286	17,636	18,828	19,367
United States	12,252	12,003	11,819	12,024	12,542	13,005	12,909	13,401	14,893	15,180
Region of residence										
New England	1,274	1,265	1,165	1,271	1,318	1,353	1,308	1,429	1,574	1,719
Middle Atlantic	3,081	2,758	2,874	2,875	2,827	2,823	2,736	2,732	2,943	2,959
South Atlantic	893	904	895	914	941	1,012	1,113	1,144	1,209	1,313
East North Central	3,128	3,210	3,005	3,105	3,355	3,339	3,306	3,361	3,731	3,766
West North Central	758	743	753	734	763	806	828	855	968	982
East South Central	236	184	170	156	208	185	192	231	281	242
West South Central	316	313	330	353	311	369	386	458	491	507
Mountain	399	376	426	460	543	572	544	646	761	743
Pacific	2,062	2,172	2,106	2,062	2,162	2,404	2,395	2,433	2,793	2,839
Other States	104	78	94	94	115	142	102	113	142	110
Other Countries	2,958	2,910	2,922	3,081	3,429	3,927	4,377	4,234	3,935	4,187
Total Europe	1,629	1,639	1,675	1,809	1,936	2,119	2,288	2,260	2,211	2,320
United Kingdom	553	530	536	562	577	641	691	734	747	780
Germany	253	273	290	339	367	421	448	398	379	393
France	259	307	310	361	410	430	460	439	402	414
Other Europe	564	529	538	548	583	628	690	689	315	733
Total Asia	856	829	817	836	1,014	1,288	1,511	1,376	1,115	1,221
Hong Kong	125	121	119	116	130	173	199	147	148	134
Israel	56	57	49	48	56	68	84	70	63	62
Japan	411	393	392	409	481	589	648	566	484	516
Other	264	258	257	264	348	458	581	594	423	508
Oceania and Other Ocean Islands	151	131	135	128	151	181	191	199	187	196
Australia	111	99	103	96	117	142	149	150	145	152
New Zealand	37	29	28	29	31	37	38	46	39	40
Other	4	3	3	4	3	3	4	4	3	3
Central America	10	10	10	10	12	11	12	12	13	15
South America	93	95	76	79	87	108	126	122	124	113
North America	74	72	75	86	95	79	96	109	126	142
Africa	50	46	48	49	50	49	56	59	59	66

Source: International Travel Survey, 1990-1999.

Table 3.3a

Selected Characteristics, International Overnight Trips to Canada, 1998 and 1999

	Total	United States	Overseas	Total	United States	Overseas
	1998	1998	1998	1999	1999	1999
thousands of person-trips						
Purpose of trip	18,828	14,893	3,935	19,367	15,180	4,187
Business	3,044	2,353	691	3,087	2,352	735
Holiday, vacation	10,556	8,579	1,977	10,785	8,709	2,076
Visiting friends or relatives	3,710	2,635	1,075	3,879	2,717	1,162
Other	1,518	1,325	193	1,615	1,402	213
Travelling party size	18,828	14,893	3,935	19,367	15,180	4,187
1 person	3,598	2,613	985	3,632	2,618	1,014
2 persons	7,925	6,327	1,598	7,999	6,374	1,625
3 persons	1,962	1,492	470	2,125	1,628	497
4 persons	2,822	2,330	492	2,876	2,351	525
5 - 9 persons	2,254	1,899	355	2,413	1,981	432
10 + persons	267	231	36	323	228	95
Survey quarter	18,828	14,893	3,935	19,367	15,180	4,187
1st quarter	2,300	1,804	496	2,551	2,008	543
2nd quarter	4,918	3,850	1,068	4,976	3,885	1,091
3rd quarter	8,259	6,566	1,693	8,429	6,631	1,798
4th quarter	3,351	2,673	678	3,409	2,655	754
Trip duration	18,828	14,893	3,935	19,367	15,180	4,187
1 - 3 night	10,488	9,682	806	10,316	9,515	801
4 - 6 nights	3,825	2,985	840	4,104	3,212	892
7 - 9 nights	2,075	1,449	626	2,279	1,600	679
10-13 nights	991	423	568	1,098	468	630
14-20 nights	874	260	614	938	279	659
21+ nights	576	94	482	632	106	526
Activities	18,828	14,893	3,935	19,367	15,180	4,187
Visit friends or relatives	6,477	4,378	2,099	6,828	4,576	2,252
Attend festivals or fairs	1,455	1,043	412	1,650	1,139	511
Attend cultural events (plays, concerts)	2,222	1,635	587	2,350	1,732	618
Attend sports events	1,146	794	352	1,171	782	389
Go shopping	12,286	9,080	3,206	12,751	9,363	3,388
Go sightseeing	11,388	8,335	3,053	11,743	8,521	3,222
Participate in nightlife/entertainment	3,809	2,952	857	3,975	3,052	923
Dine at high quality restaurants	8,276	6,483	1,793	8,526	6,659	1,867
Visit a theme park	1,429	762	667	1,435	741	694
Visit a zoo, museum, natural display	4,805	3,178	1,627	4,929	3,249	1,680
Visit park or historic site	7,352	5,261	2,091	7,464	5,177	2,287
Participate in sports/outdoor activities	5,458	4,338	1,120	5,847	4,584	1,263
Swimming	2,416	1,874	542	2,578	1,975	603
Other water sports	664	504	160	726	551	175
Hunting or fishing	1,316	1,218	98	1,378	1,259	119
Cross-country skiing	134	83	51	132	87	45
Downhill skiing	560	361	199	698	478	220
Other sports	1,858	1,452	406	1,999	1,494	505
Other activities	1,083	912	171	1,121	934	187
No activity stated	752	652	100	748	641	107

Table 3.3a

Selected Characteristics, International Overnight Trips to Canada, 1998 and 1999 – Concluded

	Total	United States	Overseas	Total	United States	Overseas
	1998	1998	1998	1999	1999	1999
thousands						
Total trip spending in Canada (\$)	11,177,311	6,703,187	4,474,124	12,040,347	7,148,702	4,891,645
Accommodation	3,184,282	2,210	974,685	3,298,733	2,306,827	991,906
Transportation ¹	1,122,579	618	504,301	1,216,432	692,339	524,093
Food and beverage	1,941,712	1,237	704,724	2,024,410	1,318,329	706,081
Recreation and entertainment	994,027	631	363,476	1,071,350	701,343	370,006
Other (souvenirs, shopping, etc.)	1,548,310	752	796,795	1,616,545	805,335	811,210
Trip spending reported in detail	8,790,910	5,447	3,343,980	9,227,470	5,824,173	3,403,297
Trip spending range (person-trips)	18,828	14,893	4,207	19,367	15,180	4,187
No trip spending	174	156	18	140	131	9
Less than \$50	593	444	150	442	430	12
\$50	2,016	1,838	178	1,902	1,778	124
\$200	1,562	1,395	167	1,606	1,475	131
\$300	2,547	2,260	288	2,458	2,180	277
\$500	2,216	1,891	325	2,198	1,881	317
\$700	2,263	1,936	327	2,149	1,829	319
\$1,000	3,634	2,712	922	3,896	2,945	952
\$2,000	2,478	1,507	971	2,684	1,648	1,037
\$4,000	834	417	418	974	501	473
\$6,000	313	125	188	378	170	207
\$8,000	163	63	100	172	64	108
\$10,000 or more	304	150	154	368	147	221
Accommodation types (person-trips)	18,828	14,893	3,935	19,367	15,180	4,187
No accommodation reported	888	642	246	844	603	242
Home of friends or relatives only	2,945	2,169	777	3,018	2,173	845
Camping or trailer park only	820	748	72	792	722	70
Cottage or cabin only	1,031	998	33	1,165	1,127	38
Other only	800	703	97	884	777	107
Hotel & motel	9,877	8,218	1,659	9,962	8,242	1,720
Combination of types of accommodation	2,466	1,414	1,052	2,701	1,537	1,164

¹ Exclude international transportation fares.

Source: International Travel Survey, 1998-1999.

Table 3.3b

Selected Characteristics, International Overnight Travellers to Canada, 1998 and 1999

	Total	United States	Overseas	Total	United States	Overseas
	1998	1998	1998	1999	1999	1999
thousands of person-trips						
Sex of traveller	18,828	14,893	3,935	19,367	15,180	4,187
Not stated	1,804	1,316	488	1,855	1,312	543
Male	8,754	6,959	1,795	9,052	7,159	1,894
Female	8,269	6,618	1,652	8,459	6,710	1,750
Age of traveller	18,828	14,893	3,935	19,367	15,180	4,187
Not stated	1,804	1,316	488	1,855	1,312	543
Total excluding not stated	17,024	13,577	3,447	3,643	13,868	3,643
Under 15 years	1,198	1,178	19	1,465	1,192	273
15 to 24	797	794	3	1,196	856	340
25 to 34	2,428	1,723	705	2,297	1,612	685
35 to 44	3,093	2,461	631	3,178	2,488	690
45 to 54	3,654	2,938	716	3,854	3,115	740
55 and over	5,349	4,481	868	5,522	4,606	916
55 to 64	2,879	2,335	545	3,013	2,437	576
65 and over	2,470	2,147	323	2,509	2,169	341
Composition of travelling party	18,828	14,893	3,935	19,367	15,180	4,187
Not stated	1,804	1,316	488	1,855	1,312	543
Total excluding not stated	17,024	13,577	3,447	17,512	13,868	3,643
Adults only	13,766	10,835	2,931	14,107	11,115	2,992
Travelling alone	3,057	2,254	803	3,095	2,273	822
2 adults	7,234	5,813	1,421	7,294	5,868	1,426
3 or more adults	3,475	2,768	707	3,718	2,974	744
Adults with child(ren)	3,247	2,740	506	3,387	2,746	641
Alone with child(ren)	274	231	43	298	243	55
2 adults with child(ren)	1,800	1,517	283	1,905	1,559	346
3 or more adults with child(ren)	1,173	992	180	1,184	944	240

Source: International Travel Survey, 1998-1999.

Table 3.4
International Overnight Travellers to Canada by Country of Residence, 1999

Country of residence	Population estimate ¹	Entries to Canada	Entries per thousand population of country of residence
	millions	thousands	number
United States	273.1	15,180	55.6
Europe			
Belgium	10.2	54	5.3
France	59.1	414	7.0
Germany	82.1	393	4.8
Italy	57.3	111	1.9
Netherlands	15.8	121	7.7
Sweden	8.9	35	3.9
Switzerland	7.1	101	14.2
United Kingdom	58.7	780	13.3
Other Countries			
Australia	19.0	152	8.0
Hong Kong SAR ²	6.8	134	19.7
Israel	6.1	62	10.2
India	986.6	62	0.1
Japan	126.5	516	4.1
Mexico	97.4	127	1.3

¹ Population estimate by the Population Division of the United Nations.

² Self-Administered Region.

Sources: Monthly Bulletin of Statistics, December 2000, United Nations; International Travel Survey, 1999.

Table 3.5

Person-trips, Nights and Expenditures of International Travellers Entering Canada and Staying One or More Nights, by Selected Trip Characteristics, 1999

Trip characteristics	Person-trips				Person-nights		Average number of nights	
	U.S.		Overseas		U.S.	Overseas	U.S.	Overseas
	thousands	%	thousands	%	thousands			
Purpose of trip								
Business, convention and employment	2,352	15.5	735	17.6	7,389	4,891	3.1	6.7
Visiting friends or relatives	2,717	17.9	1,162	27.8	11,715	16,931	4.3	14.6
Pleasure, recreation or holiday	8,709	57.4	2,076	49.6	34,520	22,616	4.0	10.9
Other	1,402	9.2	213	5.1	4,847	2,812	3.5	13.2
Total	15,180	100.0	4,187	100.0	58,471	47,250	3.9	11.3
Trip duration								
1 night	3,172	20.9	198	5.6	3,172	198	1.0	1.0
2-6 nights	9,555	62.9	1,496	37.1	30,448	5,952	3.2	4.0
7-13 nights	2,068	13.6	1,309	30.0	17,302	12,544	8.4	9.6
14-20 nights	279	1.8	659	14.9	4,427	10,780	15.9	16.4
21 nights and over	106	0.7	526	12.4	3,122	17,775	29.5	33.8
Total	15,180	100.0	4,187	100.0	58,471	47,250	3.9	11.3
Quarter of entry								
I	2,008	13.2	543	13.0	6,276	5,054	3.1	9.3
II	3,885	25.6	1,091	26.1	14,738	13,104	3.8	12.0
III	6,631	43.7	1,798	42.9	28,679	21,649	4.3	12.0
IV	2,655	17.5	754	18.0	8,778	7,442	3.3	9.9
Total	15,180	100.0	4,187	100.0	58,471	47,250	3.9	11.3
	Spending in Canada ¹		Average spending per person-trip		Average spending per person-night			
	U.S.	Overseas	U.S.	Overseas	U.S.	Overseas		
	millions \$		\$		\$			
Purpose of trip								
Business, convention and employment	1,717	958	730	1,303	232	196		
Visiting friends or relatives	635	1,091	234	939	54	64		
Pleasure, recreation or holiday	4,195	2,591	482	1,248	122	115		
Other	601	252	429	1,183	124	90		
Total	7,149	4,892	471	1,168	122	104		
Trip duration								
1 night	554	44	175	222	175	222		
2-6 nights	4,268	1,157	385	773	140	194		
7-13 nights	1,870	1,674	759	1,279	108	133		
14-20 nights	302	1,028	984	1,560	68	95		
21 nights and over	154	988	1 266	1,878	49	56		
Total	7,149	4,892	400	1,168	122	104		
Quarter of entry								
I	893	637	445	1,173	142	126		
II	1,795	1,266	462	1,160	122	97		
III	3,276	2,194	494	1,220	114	101		
IV	1,185	794	446	1,053	135	107		
Total	7,149	4,892	471	1,168	122	104		

¹ Excludes international transportation fares.

Source: International Travel Survey, 1999.

Table 4.1
The Top 25 Air Passenger Markets for Scheduled and Charter Services, 1999

Air Passenger Market	Rank 1999 ¹	Total Passengers	Passengers Using Scheduled Services ²	%	Passengers Using Charter Services ²	%
Montreal - Toronto ^{3,5}	1	1,393,013	1,241,180	89.1	151,833	10.9
Toronto - Vancouver ^{3,5}	2	1,143,891	946,760	82.8	197,131	17.2
Calgary - Toronto ^{3,5}	3	695,342	583,080	83.9	112,262	16.1
Ottawa - Toronto	4	671,540	656,910	97.8	14,630	2.2
Calgary - Vancouver ^{3,4,5}	5	561,773	531,480	94.6	30,293	5.4
Toronto - Winnipeg ^{3,5}	6	450,434	370,180	82.2	80,254	17.8
Halifax - Toronto ^{3,5}	7	425,871	332,620	78.1	93,251	21.9
Edmonton - Toronto ^{3,5}	8	357,604	305,070	85.3	52,534	14.7
Montreal - Vancouver ^{3,5}	9	342,527	242,580	70.8	99,947	29.2
Edmonton - Vancouver ^{3,4,5}	10	338,536	291,880	86.2	46,656	13.8
Edmonton - Calgary ^{3,4}	11	231,052	227,530	98.5	3,522	1.5
Vancouver - Winnipeg ^{3,4,5}	12	226,442	184,210	81.3	42,232	18.7
Ottawa - Vancouver ³	13	219,364	203,520	92.8	15,844	7.2
St. John's - Toronto ³	14	188,019	135,660	72.2	52,359	27.8
Winnipeg - Calgary ⁴	15	182,784	182,510	99.9	274	0.1
Montreal - Calgary ³	16	172,852	162,200	93.8	10,652	6.2
Thunder Bay - Toronto ⁵	17	164,420	164,420	100.0	-	-
Ottawa - Calgary	18	149,750	149,750	100.0	-	-
Vancouver - Prince George ⁴	19	133,430	133,430	100.0	-	-
Halifax - St. John's ³	20	130,463	106,030	81.3	24,433	18.7
Halifax - Montreal ⁵	21	122,063	117,140	96.0	4,923	4.0
Kelowna - Vancouver ⁴	22	121,416	121,390	100.0	26	0.0
Toronto - Victoria	23	121,210	103,880	85.7	17,330	14.3
Halifax - Ottawa	24	116,441	116,400	100.0	41	-
Ottawa - Winnipeg ⁵	25	115,532	115,500	100.0	32	-

¹ Rank is based on passenger counts for scheduled and charter flights.

² Counts for passengers using charter services represent those commercial charter services using aircraft with a maximum take-off weight greater than 15 900 kg. Counts for passengers using scheduled services represent all Level I Canadian air carriers plus those Level II carriers which, in each of the two calendar years immediately preceding the reporting year, transported 300,000 or more revenue passengers on scheduled flights.

³ Figures for this market do not include passengers who travelled on Canada 3000.

⁴ Figures for these markets do not include passengers who travelled on WestJet Airlines.

⁵ Figures for these markets do not include passengers who travelled on Royal Aviation.

Sources: Aviation Statistics, catalogue no. 51-204 and 51-207.

Table 4.2
Domestic Operations - Passengers on Domestic Charters by City Pairs, 1991 to 1999

Rank 1999	City-Pairs	1991	1992	1993	1994	1995	1996	1997	1998	1999
1	Toronto - Vancouver	155,405	179,669	233,028	271,812	313,412	242,315 ^r	222,148	229,909 ^r	197,131
2	Montreal - Toronto	3,761	4,170	2,664	2,806	4,595	48,800	104,862	131,659 ^r	151,833
3	Calgary - Toronto	76,850	64,834	85,449	93,314	104,766	88,796	78,583	95,270	112,262
4	Montreal - Vancouver	35,448	49,266	56,913	52,889	63,097	90,794	91,601	89,158 ^r	99,947
5	Halifax - Toronto	12,930	21,377	63,372	84,672	97,499	92,521	119,260	77,402	93,251
6	Edmonton - Yellowknife	-	-	-	-	-	2,641	289	23,232	83,382
7	Toronto - Winnipeg	28,492	46,841	57,944	48,108	54,741	131,558	181,173	56,242	80,254
8	Edmonton - Toronto	34,103	42,135	47,197	53,515	61,584	48,753	43,181	44,290	52,534
9	St. John's - Toronto	5,869	15,573	36,722	46,923	43,305	45,602	50,039	51,352	52,359
10	Edmonton - Vancouver	11,183	4,483	32,192	56,621	77,872	67,174	68,819	47,758	46,656
Total*		208,636	248,679	382,453	438,848	507,459	616,639^r	737,807	846,272^r	969,609

^r revised.

* Does not include others.

Source: Air Charter Statistics, catalogue no. 51-207.

Table 4.3

Transborder Journeys, Scheduled Flights Between Canada and the United States - Leading City Pairs, 1991-1999

	1991	1992	1993	1994	1995	1996	1997	1998	1999
	thousands								
New York	723	742	746	735	802	969	971	1,008	1,034
Chicago	298	297	320	315	343	370	388	401	411
Los Angeles	242	276	267	247	266	325	320	351	360
Boston	236	223	209	212	229	242	211	256	296
San Francisco	181	185	199	194	221	275	278	298	265
Miami	228	223	221	213	205	230	244	226	239
Washington/Baltimore	79	73	65	65	105	164	182	229	193
Atlanta	65	79	90	90	129	150	173	197	192
Philadelphia	90	98	107	109	114	131	132	151	155
Dallas/Fort Worth	82	82	102	110	115	128	143	157	142
Denver	35	35	39	42	48	73	75	98	108
Minneapolis/St. Paul	50	49	51	53	62	82	94	108	105
Phoenix	31	35	49	57	55	71	87	95	100
Houston	41	41	29	42	60	76	84	101	98
Tampa/St. Petersburg	193	212	206	176	154	171	130	93	90
Raleigh/Durham	19	20	28	31	35	36	59	74	84
Orlando	35	64	71	62	95	148	105	81	83
Las Vegas	25	23	31	30	39	72	64	55	66
Cleveland	76	61	51	55	52	51	55	71	63
Milwaukee	31	26	25	20	24	27	36	61	61
Other	705	849	916	912	1,027	1,169	1,177	2,309	1,516
Toronto, Total	3,465	3,693	3,822	3,770	4,180	4,960	5,008	5,412	5,661
New York	342	309	308	305	347	361	298	357	358
Chicago	96	92	110	113	118	127	130	165	179
Los Angeles	88	97	107	106	115	141	128	140	139
Miami	172	168	147	131	133	142	142	131	135
Washington/Baltimore	52	55	60	53	81	88	90	102	85
San Francisco	55	59	66	65	67	90	86	87	82
Boston	92	87	105	104	116	69	45	70	79
Atlanta	37	38	40	40	64	62	69	75	77
Fort Lauderdale	66	53	54	46	70	108	87	72	74
Philadelphia	42	48	48	46	53	56	62	60	63
Orlando	37	38	45	39	48	72	61	50	56
Dallas/Fort Worth	25	24	30	36	43	45	44	44	53
Las Vegas	12	12	15	17	18	28	33	33	51
Tampa/St. Petersburg	71	65	63	57	58	60	50	44	43
Détroit	43	39	41	39	40	38	40	35	38
Other	399	420	468	462	511	605	613	652	783
Montreal, Total	1,629	1,604	1,707	1,659	1,882	2,092	1,978	2,117	2,295

Table 4.3
Transborder Journeys, Scheduled Flights Between Canada and the United States - Leading City Pairs, 1991-1999 – Concluded

	1991	1992	1993	1994	1995	1996	1997	1998	1999
	thousands								
Los Angeles	226	206	210	197	300	348	412	485	421
San Francisco	169	158	139	144	181	222	260	387	330
New York	58	56	74	79	86	142	136	132	109
Las Vegas	12	14	18	20	36	94	100	125	101
Chicago	42	40	51	54	72	84	89	92	100
Phoenix	14	18	24	20	46	77	83	100	92
Seattle/Tacoma	81	81	72	70	72	62	72	118	90
San Diego	26	22	25	20	24	65	64	87	67
Dallas/Fort Worth	21	20	25	28	37	50	53	59	66
Portland	33	34	36	39	40	41	50	68	63
Other	427	444	547	491	634	980	1,028	961	1,170
Vancouver, Total	1,109	1,093	1,221	1,162	1,528	2,165	2,347	2,614	2,609
Los Angeles	117	127	114	111	126	123	140	150	123
San Francisco	58	58	55	56	60	76	87	101	89
Houston	34	34	38	38	51	58	66	82	82
Chicago	27	26	39	39	44	52	48	50	70
Dallas/Fort Worth	24	24	27	30	36	40	43	47	48
Other	380	395	426	430	473	662	718	722	745
Calgary, Total	640	664	699	704	790	1,011	1,102	1,152	1,157
Ottawa	295	304	319	323	398	573	614	644	743
Edmonton	348	360	376	342	356	422	482	492	469
Winnipeg	209	232	268	260	245	340	350	358	372
Halifax	154	154	135	130	156	225	217	259	289
Victoria	70	81	81	75	77	102	144	166	164
Quebec	47	51	73	61	68	94	101	110	123
Saskatoon	42	48	41	39	53	90	99	99	106
London	25	53	59	58	64	81	81	90	94
Regina	36	41	36	34	43	80	90	84	85
St. John's	38	47	36	31	37	52	54	59	62
Moncton	21	26	23	14	16	20	19	26	28
Other	212	252	255	218	235	326	379	428	434
Other Canadian Cities, Total	1,497	1,649	1,702	1,585	1,748	2,405	2,630	2,815	2,968
TOTAL	8,340	8,703	9,151	8,880	10,128	12,633	13,065	14,110	14,690

Source: Aviation Statistics, catalogue no. 51-205.

Table 4.4

Transborder Journeys, Charter Flights Between Canada and the United States - Leading City Pairs, 1991-1999

	1991	1992	1993	1994	1995	1996	1997	1998	1999
Orlando, Florida ^r	211,989	217,126	221,053	203,735	142,104	63,055	120,207	24,234	731
Las Vegas, Nevada ^r	175,616	197,065	214,809	232,827	211,009	147,397	135,732	39,118	13
Fort Lauderdale, Florida ^r	168,551	159,532	141,255	117,957	101,746	28,012	71,164	13,992	399
Clearwater/St. Petersburg, Florida	214,152	204,266	194,328	184,375	142,900	53,395	108,045	23,779	-
Fort Myers, Florida	82,885	86,907	74,956	69,762	52,630	2,858	8,762	6,562	173
Atlantic City, New Jersey	41,021	36,833	24,660	18,989	5,714	3,322	117	-	355
Tampa, Florida	12,500	1,955	4	12	178	362	3	476	498
West Palm Beach, Florida	34,187	38,346	35,670	29,097	19,802	3,807	12,152	5,025	14
Los Angeles, California	7,579	10	368	16,737	30,780	122	222	3,747	6
Honolulu, Hawaii	-	3,029	134	3,352	1,752	-	-	-	-
Miami, Florida	139	611	14	409	841	1,017	6,632	57	696
Other	39,798	72,365	71,234	53,330	49,654	38,462	38,626	16,436	11,771
Toronto¹, Total	988,417	1,018,045	978,485	930,582	759,110	341,809	501,662	133,426	14,656
Fort Lauderdale, Florida ^r	235,840	309,908	306,295	271,594	206,172	152,180	140,775	527	257
Orlando, Florida	56,703	72,484	52,630	45,199	29,632	20,109	35,000	-	8
Miami, Florida	222	179	28	140	191	395	257	135	-
Other	61,544	52,460	43,300	31,861	22,277	30,891	20,121	4,552	2,195
Montreal², Total	354,309	435,031	402,253	348,794	258,272	203,575	196,153	5,214	2,460
Las Vegas, Nevada	45,969	53,085	57,792	85,274	73,337	26,645	36,515	14,551	16,228
Reno, Nevada	68,485	57,748	59,703	41,923	32,913	2,365	1,586	-	3,196
Honolulu, Hawaii	34,957	39,574	57,085	73,703	72,709	5,584	605	3,285	353
Other	54,129	60,881	86,865	143,897	168,654	20,191	15,831	4,670	5,586
Vancouver, Total	203,540	211,288	261,445	344,797	347,613	54,785	54,537	22,506	25,363
Las Vegas, Nevada	30,218	30,430	50,898	71,785	51,391	15,946	16,804	22,425	15,432
Reno, Nevada	13,153	11,522	10,750	7,133	5,610	9,790	1,892	422	-
Honolulu, Hawaii	8,893	10,364	10,133	7,385	8,798	611	-	2,979	706
Other	23,353	18,409	17,201	18,500	28,357	5,915	10,956	7,989	2,979
Calgary, Total	75,617	70,725	88,982	104,803	94,156	32,262	29,652	33,815	19,117
Las Vegas, Nevada	33,313	36,667	50,427	56,583	51,391	22,997	17,151	17,237	-
Reno, Nevada	8,919	8,685	8,252	6,082	4,908	7,388	5,066	3,980	-
Honolulu, Hawaii	8,897	10,128	12,114	10,244	9,029	885	-	-	-
Other	6,436	11,174	15,825	13,391	28,581	1,946	1,753	2,866	1,445
Edmonton³, Total	57,565	66,654	86,618	86,300	93,909	33,216	23,970	24,083	1,445
Quebec	80,460	93,252	82,877	56,839	53,302	49,258	40,362	14,430	5,027
Halifax	34,766	34,154	32,360	28,867	27,096	8,002	16,279	15,632	5,164
Victoria	17,632	18,526	14,673	20,612	15,741	13,753	15,410	3,226	7
Winnipeg	59,371	65,207	60,007	67,300	66,570	7,719	7,575	374	405
Ottawa	27,116	39,588	30,448	22,024	22,121	12,722	6,700	3,092	3,289
Other Canadian Cities Total	53,284	73,455	79,439	73,638	59,422	54,412	45,484	14,015	9,326
TOTAL	1,952,077	2,125,925	2,117,587	2,084,556	1,797,312	811,513	937,784	269,613	86,259

^r revised.¹ Lester B. Pearson International.² Dorval and Mirabel Airports.³ Edmonton International and Municipal Airports.

Source: Air Charter Statistics, catalogue no. 51-207.

Table 4.5
Passenger Automobile Registrations, by Province and Territory, 1991-1999

Province or Territory ¹	1991	1992	1993	1994	1995	1996	1997	1998	1999 ²
thousands									
Newfoundland	202	207	207	217	210	208	208	219	240
Prince Edward Island	64	62	65	65	66	65	66	58	71
Nova Scotia	426	422	429	392	368	364	359	357	499
New Brunswick	312	318	324	328	295	292	299	336	422
Quebec	2,978	3,031	3,070	3,107	3,133	3,182	3,228	3,286	3,844
Ontario	4,847	4,925	5,002	5,069	5,098	5,121	5,223	5,370	6,174
Manitoba	544	551	551	557	475	449	431	438	567
Saskatchewan	416	441	414	421	407	378	405	482	616
Alberta	1,424	1,482	1,507	1,546	1,549	1,551	1,609	1,670	1,878
British Columbia	1,807	1,852	1,879	1,916	1,561	1,586	1,630	1,648	2,186
Yukon	20	9	10	11	11	11	10	8	22
Northwest Territories	20	20	20	10	10	9	19	17	19
Canada	13,061	13,322	13,478	13,639	13,183	13,217	13,487	13,887	16,538

¹ The statistics on vehicle registrations shown on this table have been obtained from the 12 provincial and territorial governments, each with its own distinct registration system. Consequently, the reader is advised to read the "Interprovincial Differences" in Road Motor Vehicles Registrations, catalogue no. 53-219, before comparing the provincial and territorial statistics.

² Since 1999, automobiles are represented by vehicles under 4,500 kg.

Source: Road Motor Vehicles: Registrations, catalogue no. 53-219.

Table 4.6
Share of Passenger Revenues by Mode of Transport, Canadian Carriers, 1991-1999¹

Mode of transport	Catalogue No.	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
\$ millions											
Rail	52-216	215	155	159	169	180	179	186	199	208	225
Intercity bus	53-215	404	408	397	362	381	368	342	304	133	106
Urban Transit	53-215	3,107	3,459	3,587	3,625	3,512	3,580	3,676	3,846	1,806*	4,414
School buses	53-215	676	768	873	861	1,015	1,053	1,032	1,023	1,287	1,333
Other bus	53-215	167	184	214	230	239	243	270	253	350	334
Marine	50-002	144	151	126	144	175	179	226 ^r	207 ^r	205	n.a.
Air	51-206	6,973	4,822	4,825	6,418	7,190	7,900	8,640	9,453	10,367	11,186
Total		11,686	9,947	10,181	11,809	12,453	13,502	14,391	15,315	14,356	n.a.

^r Revised.

* Excludes operating subsidies.

n.a. Not available

¹ These figures include operating subsidies.

² Estimate.

Table 5.1

Total Revenue for Accommodation Services by Province or Territory, 1990-1998

Province or territory	1990	1991	1992	1993	1994	1995	1996	1997	1998	Change 1998/1990
	\$ millions									%
Canada	8,937	8,630	8,628	8,884	9,405	9,920	10,201	10,737	11,278	26.2
Newfoundland	119	113	112	115	120	125	118	128	125	4.9
Prince Edward Island	48	48	48	47	52	57	58	62	62	29.4
Nova Scotia	212	201	199	207	210	228	226	237	256	20.8
New Brunswick	154	145	147	154	164	173	171	183	188	22.3
Quebec	1,618	1,530	1,488	1,465	1,536	1,622	1,660	1,766	1,897	17.2
Ontario	2,817	2,634	2,600	2,654	2,808	2,971	3,098	3,281	3,602	27.9
Manitoba	493	472	483	472	493	520	520	527	563	14.2
Saskatchewan	388	381	386	388	403	431	448	461	474	22.2
Alberta	1,254	1,265	1,271	1,363	1,462	1,537	1,576	1,684	1,725	37.6
British Columbia	1,695	1,702	1,753	1,882	2,013	2,109	2,177	2,253	2,244	32.4
Yukon	80	82	85	81	84	85	90	91	83	3.2
Northwest Territories	59	55	54	57	60	63	60	63	59	0.2

Source: Traveller Accommodation Statistics, catalogue no. 63-204.

Table 5.2

Total Revenue of Hotels and Motor Hotels by Province or Territory, 1990-1998

Province or territory	1990	1991	1992	1993	1994	1995	1996	1997	1998	Change 1998/1990
	\$ millions									%
Canada	7,090	6,828	6,829	7,027	7,413	7,779	8,010	8,436	8,904	25.6
Newfoundland	89	83	80	79	81	82	77	77	74	-17.2
Prince Edward Island	29	31	32	31	34	34	37	39	39	33.4
Nova Scotia	157	149	154	161	164	176	172	180	196	24.7
New Brunswick	93	88	95	100	108	111	110	119	124	33.0
Quebec	1,241	1,162	1,121	1,092	1,134	1,196	1,230	1,318	1,437	15.8
Ontario	2,160	1,999	1,968	2,009	2,119	2,244	2,347	2,509	2,793	29.3
Manitoba	426	410	420	404	421	442	442	443	476	11.8
Saskatchewan	314	314	317	319	329	350	361	362	370	17.7
Alberta	1,105	1,115	1,120	1,200	1,287	1,334	1,361	1,446	1,470	33.0
British Columbia	1,375	1,379	1,426	1,537	1,637	1,707	1,771	1,840	1,825	32.7
Yukon	53	54	55	52	54	55	57	58	57	7.5
Northwest Territories	47	43	41	44	46	48	44	46	45	-4.3

Source: Traveller Accommodation Statistics, catalogue no. 63-204.

Table 5.3
Total Revenue of Motels by Province or Territory, 1990-1998

Province or territory	1990	1991	1992	1993	1994	1995	1996	1997	1998	Change 1998/1990
\$ millions										%
Canada	997	946	915	917	958	1,017	1,025	1,091	1,129	13.2
Newfoundland	19	19	20	21	21	22	21	30	31	62.6
Prince Edward Island	11	10	10	10	11	13	11	12	12	10.0
Nova Scotia	42	39	30	30	30	33	33	36	38	-10.0
New Brunswick	47	44	37	37	39	42	40	41	42	-11.3
Quebec	219	209	206	203	211	222	221	217	224	2.2
Ontario	302	285	270	263	271	282	290	305	329	8.9
Manitoba	25	22	21	21	22	23	24	29	31	25.2
Saskatchewan	42	35	35	35	36	39	42	53	57	36.4
Alberta	94	93	91	98	106	116	118	134	141	50.0
British Columbia	177	173	176	182	194	207	208	211	206	16.3
Yukon	14	14	16	14	15	15	16	17	15	7.1
Northwest Territories	3	3	3	3	3	2	2	4	3	3.3

Source: Traveller Accommodation Statistics, catalogue no. 63-204.

Table 5.4
Total Revenue of Other Accommodation Industries by Province or Territory, 1990-1998

Province or territory	1990	1991	1992	1993	1994	1995	1996	1997	1998	Change 1998/1990
\$ millions										%
Canada	851	855	884	939	1,035	1,124	1,166	1,210	1,245	46.3
Newfoundland	11	11	13	16	19	20	20	21	20	83.6
Prince Edward Island	7	7	6	6	7	10	10	11	11	61.4
Nova Scotia	14	13	15	15	16	19	21	22	22	60.0
New Brunswick	14	13	15	16	18	20	21	23	23	64.3
Quebec	158	159	161	170	191	204	208	231	236	49.5
Ontario	354	350	362	381	418	444	461	467	480	35.5
Manitoba	42	40	42	47	50	55	54	55	56	32.6
Saskatchewan	31	33	34	34	38	42	45	47	48	53.2
Alberta	55	57	61	64	70	87	97	104	114	107.5
British Columbia	143	149	151	164	182	195	198	201	213	49.2
Yukon	13	13	14	15	15	15	17	17	11	-18.5
Northwest Territories	8	9	10	10	11	12	13	13	11	38.7

Source: Traveller Accommodation Statistics, catalogue no. 63-204.

Table 5.5
Receipts of Restaurants, Caterers and Taverns, by Province or Territory, 1990-1999

Province or territory	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	Change 1999/1990
	\$ millions										%
Canada	19,401	18,088	19,018	20,150	21,515	22,291	23,436	24,974	26,993	28,144	45.1
Newfoundland	186	193	204	212	225	245	267	273	305	324	74.5
Prince Edward Island	67	65	64	72	83	96	102	101	103	115	72.7
Nova Scotia	444	426	451	491	559	587	627	663	731	750	68.8
New Brunswick	337	333	352	397	433	456	502	507	524	579	71.8
Québec	4,592	4,244	4,464	4,550	4,823	4,822	4,986	5,325	5,674	5,421	18.0
Ontario	8,144	7,230	7,471	7,749	8,117	8,407	8,811	9,226	10,180	11,164	37.1
Manitoba	574	530	569	609	646	670	704	742	752	796	38.7
Saskatchewan	498	493	510	572	636	656	678	733	775	819	64.4
Alberta	1,852	1,891	1,924	2,156	2,315	2,432	2,634	3,000	3,244	3,638	96.4
British-Columbia	2,664	2,643	2,967	3,289	3,623	3,855	4,055	4,335	4,641	4,468	67.7
Yukon	15	15	17	22	25	28	30	29	27	30	98.1
Northwest Territories including Nunavut	27	26	25	31	30	38	40	41	39	39	41.1
Northwest Territories										38	100.0
Nunavut										3	100.0

Source: Receipts of Restaurants, Caterers and Taverns Survey.

Table 5.6
Travel Services, Number of Businesses and Total Revenues, 1990-1998

		SIC							NAICS ²	
		1990	1991	1992	1993	1994	1995	1996	1997	1998
Travel Services										
Revenues	\$ millions	3,980	4,078	4,291	4,659	5,140	5,591	5,667	6,016	5,934
Number of Businesses ¹		4,310	4,477	4,442	4,673	4,795	5,399	5,245	5,236	6,080
Ticket and Travel Agencies										
Revenues	\$ millions	1,481	1,450	1,446	1,431	1,514	1,685	1,750	1,797	1,679
Number of Businesses ¹		3,667	3,778	3,705	3,903	3,912	4,471	4,192	4,313	5,062
Tour Wholesalers and Operators										
Revenues	\$ millions	2,499	2,628	2,845	3,228	3,626	3,906	3,917	4,219	4,255
Number of Businesses ¹		643	699	737	770	883	928	1,053	923	1,018

¹ Businesses reporting zero dollar sales are excluded.

² Starting in 1997, statistics are broken down according to the new North American Industrial Classification System. Previously they were categorized according to the 1980 Standard Industrial Classification.

Source: Cansim, table 352-0001 and 351-0003.

Table 5.7
Total Operating Revenue of Heritage Institutions, 1990-91 to 1997-98

Province or Territory	1990-91	1991-92	1992-93	1993-94	1995-96	1997-98
\$ millions						
Canada*	1,035	1,108	1,127	1,167	1,220	1,296
Newfoundland	14	15	15	15	14	14
Prince Edward Island	8	8	8	8	5	6
Nova Scotia	36	35	36	36	36	42
New Brunswick	21	22	23	24	24	25
Québec	220	258	278	269	293	299
Ontario	404	430	418	416	428	465
Manitoba	40	39	40	39	35	38
Saskatchewan	29	30	33	33	42	45
Alberta	133	140	141	141	125	134
British Columbia	115	118	123	171	204	213
Yukon	6	6	7	7	8	6
Northwest Territories	8	7	8	8	6	9

* Figures may not add to totals due to rounding.

Source: Statistics Canada, Culture, Tourism and the Centre for Education Statistics.

Table 5.8
Total Revenue for Arts, Entertainment and Recreation (all firms), Canada, 1997 and 1998

Industry as defined by the North American Industry Classification System (NAICS)		1997	1998
No.	Title	\$ thousands	\$ thousands
7111	Performing Arts Companies	811,836 ^r	901,201
7112	Spectator Sports	1,366,484	1,581,864
7131	Amusement Parks and Arcades	393,326	446,382
7139	Other Amusement and Recreation Industries	4,326,607 ^r	4,702,829
71391	Golf Courses and Country Clubs	1,502,042	1,622,120
71392	Skiing Facilities	538,427 ^r	540,633
71394	Fitness and Recreational Sports Centres	796,851	817,732
7139A ¹	Marinas, Bowling Centres and All Other Amusement and Recreation Industries	1,489,287	1,722,344
Total - Performing Arts Companies, Spectator Sports, Amusement Parks and Arcades, and Other Amusement and Recreation Industries		6,898,253	7,632,276

¹ Includes 713930, Marinas, 713950, Bowling Centres and 713990, All Other Amusement and Recreation Industries.

^r Revised figures.

Source: Annual Survey of Arts, Entertainment and Recreation, 1997 and 1998.

Table 5.9

Distribution of the Client Base as a Percentage of Total Operating Revenue (incorporated firms with revenue greater than \$50,000), for Arts, Entertainment and Recreation, Canada, 1997-1998

		1997				1998			
Industry as defined by the North American Industry Classification System (NAICS)		Households and Individuals	Business	Government	Foreign Consumers	Households and Individuals	Business	Government	Foreign Consumers
No.	Title	percentage							
7111	Performing Arts Companies	70	18	9	4	70	18	9	4
7112	Spectator Sports	51	40	2	8	52	38	3	7
7131	Amusement Parks and Arcades	77	11	7	5	68	17	6	9
7139	Other Amusement and Recreation	78	14	2	6	79	13	2	6
71391	Golf Courses and Country Clubs	78	20	1	1	80	17	2	1
71392	Skiing Facilities	66	6	1	27	66	5	2	27
71394	Fitness and Recreational Sports Centres	88	8	3	1	90	6	3	1
7139A ¹	Marinas, Bowling Centres and All Other Amusement and Recreation Industries	80	14	3	4	78	14	3	4
Total - Performing Arts Companies, Spectator Sports Amusement Parks and Arcades, and Other Amusement and Recreation Industries		72	20	3	6	72	19	3	6

¹ Includes 713930, Marinas, 713950, Bowling Centres and 713990, All Other Amusement and Recreation Industries.

² Revised figures.

Note Due to rounding, components may not add to total.

Source: Annual Survey of Arts, Entertainment and Recreation, 1997 and 1998.

Table 5.10

Percentage Distribution of Full-Time and Part-Time Employment (incorporated firms with revenue greater than \$50,000), for Arts, Entertainment and Recreation, Canada, 1997-1998

		1997			1998		
Industry as defined by the North American Classification System (NAICS)		Full-time	Part-time	Contract Employees	Full-time	Part-time	Contract Employees
No.	Title	percentage					
7111	Performing Arts Companies	38	25	37	33	21	45
7112	Spectator Sports	30	65	5	29	67	4
7131	Amusement Parks and Arcade	23	69	8	14	84	2
7139	Other Amusement and Recreation Industries	33	62	5	39	56	6
71391	Golf Courses and Country Club	34	65	2	45	54	1
71392	Skiing Facilities	37	60	4	46	53	1
71394	Fitness and Recreational Sports Centres	25	67	8	29	63	8
7139A ¹	Marinas, Bowling Centres and All Other Amusement and Recreation Industries	35	58	7	34	54	11
Total - Performing Arts Companies, Spectator Sports, Amusement Parks and Arcades, and Other Amusement and Recreation Industries		32	59	9	35	57	9

¹ Includes 713930, Marinas, 713950, Bowling Centres and 713990, All Other Amusement and Recreation Industries.

Note Due to rounding, components may not add to total.

Source: Annual Survey of Arts, Entertainment and Recreation, 1997 and 1998.

Table 6.1
Tourism Demand in Canada
 Millions of dollars and percentage change from preceding year

	Years									
	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Transportation	13,735 6.3	13,277 -3.3	13,340 0.5	14,008 5.0	14,882 6.2	15,618 4.9	16,539 5.9	17,627 6.6	18,510 5.0	20,084 8.5
Passenger air transport	7,049 6.6	6,630 -5.9	6,653 0.3	7,131 7.2	7,637 7.1	8,087 5.9	8,881 9.8	9,798 10.3	10,581 8.0	11,596 9.6
Passenger rail transport	143 -38.4	149 4.2	154 3.4	167 8.4	182 9.0	184 1.1	192 4.3	203 5.7	216 6.4	232 7.4
Interurban bus transport	484 5.0	489 1.0	505 3.3	491 -2.8	501 2.0	544 8.6	541 -0.6	565 4.4	596 5.5	613 2.9
Vehicle rental	743 3.3	764 2.8	773 1.2	790 2.2	835 5.7	862 3.2	892 3.5	902 1.1	959 6.3	1,014 5.7
Vehicle repairs and parts	1,682 6.9	1,676 -0.4	1,681 0.3	1,793 6.7	1,937 8.0	2,007 3.6	1,935 -3.6	1,898 -1.9	1,945 2.5	1,990 2.3
Vehicle fuel	3,125 9.5	3,069 -1.8	3,057 -0.4	3,106 1.6	3,231 4.0	3,353 3.8	3,496 4.3	3,627 3.7	3,533 -2.6	3,925 11.1
Other transportation	509 8.8	500 -1.8	517 3.4	530 2.5	559 5.5	581 3.9	602 3.6	634 5.3	680 7.3	714 5.0
Accommodation	4,978 11.4	5,050 1.4	4,997 -1.0	5,257 5.2	5,579 6.1	5,908 5.9	5,928 0.3	6,188 4.4	6,720 8.6	7,060 5.1
Hotels	3,650 12.0	3,684 0.9	3,637 -1.3	3,848 5.8	4,101 6.6	4,369 6.5	4,401 0.7	4,613 4.8	4,997 8.3	5,276 5.6
Motels	796 11.3	808 1.5	803 -0.6	829 3.2	863 4.1	899 4.2	878 -2.3	908 3.4	1,000 10.1	1,024 2.4
Other accommodation	532 7.5	558 4.9	557 -0.2	580 4.1	615 6.0	640 4.1	649 1.4	667 2.8	723 8.4	760 5.1
Food and beverage services	5,142 2.6	5,108 -0.7	5,279 3.3	5,572 5.6	6,053 8.6	6,472 6.9	6,766 4.5	7,085 4.7	7,716 8.9	8,103 5.0
Meals, from accommodation services	738 -0.7	744 0.8	747 0.4	782 4.7	851 8.8	920 8.1	947 2.9	973 2.7	1,063 9.2	1,096 3.1
Meals, from food and beverage services	3,111 3.6	3,075 -1.2	3,204 4.2	3,383 5.6	3,692 9.1	3,889 5.3	4,079 4.9	4,307 5.6	4,686 8.8	4,944 5.5
Alcohol, from accommodation services	442 -2.6	437 -1.1	444 1.6	456 2.7	475 4.2	506 6.5	520 2.8	535 2.9	585 9.3	607 3.8
Alcohol, from food and beverage services	685 4.9	682 -0.4	712 4.4	773 8.6	842 8.9	945 12.2	990 4.8	1,025 3.5	1,109 8.2	1,160 4.6
Meals and alcohol, from other industries	166 6.4	170 2.4	172 1.2	178 3.5	193 8.4	212 9.8	230 8.5	245 6.5	273 11.4	296 8.4
Other tourism commodities	2,769 9.0	2,812 1.6	2,894 2.9	3,157 9.1	3,407 7.9	3,813 11.9	4,160 9.1	4,444 6.8	4,800 8.0	5,073 5.7
Recreation and entertainment	1,845 3.9	1,889 2.4	1,922 1.7	2,062 7.3	2,170 5.2	2,446 12.7	2,664 8.9	2,818 5.8	3,088 9.6	3,294 6.7
Travel agency services	845 21.8	845 --	890 5.3	1,007 13.1	1,143 13.5	1,268 10.9	1,396 10.1	1,529 9.5	1,609 5.2	1,673 4.0
Convention fees	79 11.3	78 -1.3	82 5.1	88 7.3	94 6.8	99 5.3	100 1.0	97 -3.0	103 6.2	106 2.9
Total tourism commodities	26,624 6.8	26,247 -1.4	26,510 1.0	27,994 5.6	29,921 6.9	31,811 6.3	33,393 5.0	35,344 5.8	37,746 6.8	40,320 6.8
Total other commodities	6,576 5.8	6,825 3.8	6,996 2.5	7,325 4.7	7,666 4.7	8,072 5.3	8,380 3.8	8,643 3.1	9,303 7.6	9,792 5.3
Total tourism expenditures	33,200 6.6	33,072 -0.4	33,506 1.3	35,319 5.4	37,587 6.4	39,883 6.1	41,773 4.7	43,987 5.3	47,049 7.0	50,112 6.5

-- amount too small to be expressed.

Source: National Tourism Indicators, Catalogue no. 13-009.

Table 6.2

Tourism Demand in Canada

Millions of 1992 dollars and percentage change from preceding year

	Years									
	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Transportation	14,241	13,007	13,340	13,732	14,259	14,641	15,305	15,677	16,285	16,898
	-2.7	-8.7	2.6	2.9	3.8	2.7	4.5	2.4	3.9	3.8
Passenger air transport	7,423	6,457	6,653	6,832	7,058	7,401	8,124	8,438	8,731	9,241
	-1.8	-13.0	3.0	2.7	3.3	4.9	9.8	3.9	3.5	5.8
Passenger rail transport	176	163	154	163	165	155	157	160	163	170
	-48.1	-7.2	-5.6	5.8	1.3	-6.2	1.3	2.0	1.9	4.3
Interurban bus transport	612	525	505	479	479	510	490	498	496	498
	-7.5	-14.2	-3.8	-5.2	---	6.5	-3.9	1.7	-0.4	0.4
Vehicle rental	725	737	773	786	781	738	754	779	829	857
	-1.4	1.6	4.9	1.7	-0.6	-5.5	2.0	3.4	6.4	3.4
Vehicle repairs and parts	1,711	1,641	1,681	1,792	1,931	1,977	1,887	1,835	1,846	1,868
	2.1	-4.1	2.4	6.6	7.8	2.4	-4.6	-2.7	0.6	1.2
Vehicle fuel	3,013	2,976	3,057	3,164	3,305	3,309	3,331	3,394	3,621	3,646
	-3.0	-1.2	2.7	3.5	4.5	0.1	0.6	1.9	6.7	0.7
Other transportation	580	507	517	516	539	550	563	573	599	618
	5.0	-12.6	1.9	-0.2	4.5	2.0	2.3	1.8	4.5	3.2
Accommodation	5,047	5,022	4,997	5,215	5,373	5,444	5,361	5,470	5,681	5,706
	8.0	-0.5	-0.5	4.4	3.0	1.3	-1.5	2.0	3.9	0.4
Hotels	3,697	3,659	3,637	3,819	3,953	4,028	3,988	4,083	4,227	4,267
	8.6	-1.0	-0.6	5.0	3.5	1.9	-1.0	2.4	3.5	0.9
Motels	811	803	803	820	828	825	788	799	839	821
	8.1	-0.9	---	2.1	1.0	-0.3	-4.4	1.3	5.0	-2.1
Other accommodation	539	560	557	576	592	590	585	588	615	618
	4.4	3.8	-0.5	3.4	2.7	-0.2	-0.8	0.5	4.6	0.5
Food and beverage services	5,823	5,212	5,279	5,488	5,897	6,205	6,396	6,592	7,015	7,216
	-2.3	-10.5	1.3	4.0	7.4	5.2	3.1	3.1	6.4	2.9
Meals, from accommodation services	832	756	747	771	827	878	891	899	954	952
	-5.2	-9.1	-1.3	3.3	7.2	6.2	1.4	0.9	6.1	-0.2
Meals, from food and beverage services	3,512	3,133	3,204	3,338	3,599	3,717	3,839	3,984	4,244	4,395
	-1.2	-10.8	2.3	4.2	7.8	3.3	3.3	3.8	6.5	3.6
Alcohol, from accommodation services	507	448	444	447	464	491	498	508	537	540
	-7.6	-11.6	-1.0	0.6	3.8	5.9	1.5	1.9	5.7	0.6
Alcohol, from food and beverage services	784	699	712	757	818	914	949	973	1,032	1,064
	-0.7	-10.8	1.8	6.3	8.1	11.8	3.8	2.6	6.1	3.1
Meals and alcohol, from other industries	187	175	172	175	189	204	219	228	248	265
	---	-6.7	-1.6	1.6	7.9	8.1	7.5	4.0	8.8	6.9
Other tourism commodities	3,130	2,895	2,894	3,098	3,268	3,550	3,767	3,932	4,157	4,277
	2.0	-7.5	---	7.0	5.5	8.6	6.1	4.4	5.7	2.9
Recreation and entertainment	2,125	1,950	1,922	2,025	2,076	2,262	2,380	2,451	2,629	2,713
	-3.0	-8.2	-1.4	5.4	2.5	9.0	5.2	3.0	7.3	3.2
Travel agency services	921	865	890	987	1,102	1,193	1,294	1,392	1,435	1,469
	15.3	-6.1	2.9	10.8	11.7	8.3	8.4	7.6	3.1	2.4
Convention fees	85	81	82	86	91	95	94	89	93	95
	8.2	-4.6	1.6	4.7	6.0	4.2	-1.3	-4.9	4.5	2.2
Total tourism commodities	28,241	26,136	26,510	27,533	28,797	29,839	30,829	31,671	33,138	34,097
	-0.3	-7.5	1.4	3.9	4.6	3.6	3.3	2.7	4.6	2.9
Total other commodities	6,859	6,891	6,996	7,186	7,415	7,665	7,856	7,988	8,488	8,872
	2.1	0.5	1.5	2.7	3.2	3.4	2.5	1.7	6.3	4.5
Total tourism expenditures	35,100	33,027	33,506	34,718	36,212	37,504	38,685	39,659	41,626	42,969
	0.2	-5.9	1.4	3.6	4.3	3.6	3.1	2.5	5.0	3.2

-- amount too small to be expressed.

Source: National Tourism Indicators, Catalogue no. 13-009.

Table 6.3

Tourism Domestic Demand - Canada

Millions of dollars and percentage change from preceding year

	Years									
	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Transportation	11,771 6.4	11,371 -3.4	11,416 0.4	11,900 4.2	12,379 4.0	12,710 2.7	13,334 4.9	14,280 7.1	14,897 4.3	16,165 8.5
Passenger air transport	5,892 8.0	5,538 -6.0	5,572 0.6	5,932 6.5	6,208 4.7	6,445 3.8	7,082 9.9	7,909 11.7	8,577 8.4	9,426 9.9
Passenger rail transport	101 -47.4	110 8.9	117 6.4	126 7.7	132 4.8	123 -6.8	125 1.6	132 5.6	133 0.8	144 8.3
Interurban bus transport	415 2.7	411 -1.0	414 0.7	393 -5.1	381 -3.1	404 6.0	382 -5.4	397 3.9	407 2.5	412 1.2
Vehicle rental	476 -4.4	492 3.4	476 -3.3	464 -2.5	442 -4.7	376 -14.9	352 -6.4	353 0.3	360 2.0	361 0.3
Vehicle repairs and parts	1,636 6.9	1,629 -0.4	1,635 0.4	1,744 6.7	1,881 7.9	1,945 3.4	1,868 -4.0	1,829 -2.1	1,865 2.0	1,907 2.3
Vehicle fuel	2,848 9.2	2,801 -1.7	2,799 -0.1	2,838 1.4	2,924 3.0	3,005 2.8	3,111 3.5	3,229 3.8	3,109 -3.7	3,456 11.2
Other transportation	403 8.9	390 -3.2	403 3.3	403 --	411 2.0	412 0.2	414 0.5	431 4.1	446 3.5	459 2.9
Accommodation	3,344 13.2	3,441 2.9	3,329 -3.3	3,450 3.6	3,536 2.5	3,579 1.2	3,340 -6.7	3,375 1.0	3,561 5.5	3,636 2.1
Hotels	2,386 15.0	2,457 3.0	2,366 -3.7	2,466 4.2	2,531 2.6	2,574 1.7	2,402 -6.7	2,399 -0.1	2,522 5.1	2,588 2.6
Motels	607 11.2	609 0.3	592 -2.8	601 1.5	608 1.2	613 0.8	567 -7.5	584 3.0	637 9.1	634 -0.5
Other accommodation	351 5.1	375 6.8	371 -1.1	383 3.2	397 3.7	392 -1.3	371 -5.4	392 5.7	402 2.6	414 3.0
Food and beverage services	3,517 0.3	3,398 -3.4	3,524 3.7	3,673 4.2	3,826 4.2	3,963 3.6	4,007 1.1	4,174 4.2	4,426 6.0	4,562 3.1
Meals, from accommodation services	494 -3.1	485 -1.8	491 1.2	504 2.6	529 5.0	558 5.5	552 -1.1	573 3.8	612 6.8	610 -0.3
Meals, from food and beverage services	2,139 1.3	2,056 -3.9	2,150 4.6	2,246 4.5	2,353 4.8	2,374 0.9	2,407 1.4	2,524 4.9	2,670 5.8	2,774 3.9
Alcohol, from accommodation services	293 -5.8	283 -3.4	292 3.2	290 -0.7	283 -2.4	292 3.2	287 -1.7	294 2.4	314 6.8	315 0.3
Alcohol, from food and beverage services	477 2.4	459 -3.8	476 3.7	517 8.6	541 4.6	609 12.6	622 2.1	635 2.1	669 5.4	689 3.0
Meals and alcohol, from other industries	114 4.6	115 0.9	115 --	116 0.9	120 3.4	130 8.3	139 6.9	148 6.5	161 8.8	174 8.1
Other tourism commodities	2,128 8.4	2,136 0.4	2,176 1.9	2,371 9.0	2,523 6.4	2,802 11.1	3,028 8.1	3,275 8.2	3,479 6.2	3,649 4.9
Recreation and entertainment	1,257 1.2	1,264 0.6	1,262 -0.2	1,339 6.1	1,359 1.5	1,516 11.6	1,623 7.1	1,745 7.5	1,872 7.3	1,984 6.0
Travel agency services	821 21.3	821 --	863 5.1	976 13.1	1,106 13.3	1,223 10.6	1,346 10.1	1,479 9.9	1,552 4.9	1,610 3.7
Convention fees	50 13.6	51 2.0	51 --	56 9.8	58 3.6	63 8.6	59 -6.3	51 -13.6	55 7.8	55 --
Total tourism commodities	20,760 6.5	20,346 -2.0	20,445 0.5	21,394 4.6	22,264 4.1	23,054 3.5	23,709 2.8	25,104 5.9	26,363 5.0	28,012 6.3
Total other commodities	5,097 6.0	5,342 4.8	5,457 2.2	5,636 3.3	5,744 1.9	5,872 2.2	5,962 1.5	6,149 3.1	6,497 5.7	6,812 4.8
Total tourism expenditures	25,857 6.4	25,688 -0.7	25,902 0.8	27,030 4.4	28,008 3.6	28,926 3.3	29,671 2.6	31,253 5.3	32,860 5.1	34,824 6.0

-- amount too small to be expressed.

Source: National Tourism Indicators, Catalogue no. 13-009.

Table 6.4

Tourism Domestic Demand - Canada

Millions of 1992 dollars and percentage change from preceding year

	Years									
	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Transportation	12,203 -3.2	11,142 -8.7	11,416 2.5	11,636 1.9	11,888 2.2	11,935 0.4	12,314 3.2	12,566 2.0	12,923 2.8	13,328 3.1
Passenger air transport	6,222 -1.7	5,401 -13.2	5,572 3.2	5,641 1.2	5,725 1.5	5,855 2.3	6,396 9.2	6,626 3.6	6,814 2.8	7,177 5.3
Passenger rail transport	122 -56.3	119 -2.9	117 -1.5	122 4.5	119 -2.9	103 -13.2	100 -3.4	101 1.5	97 -4.0	102 5.2
Interurban bus transport	525 -9.4	440 -16	414 -6.0	383 -7.5	363 -5.3	378 4.3	346 -8.6	350 1.3	337 -3.7	332 -1.5
Vehicle rental	466 -8.6	474 1.7	476 0.5	462 -2.9	413 -10.5	323 -21.8	298 -7.9	305 2.5	311 2.0	304 -2.3
Vehicle repairs and parts	1,664 2.2	1,595 -4.1	1,635 2.5	1,744 6.7	1,876 7.6	1,916 2.1	1,821 -4.9	1,768 -2.9	1,776 0.5	1,796 1.1
Vehicle fuel	2,745 -3.3	2,716 -1.1	2,799 3.1	2,890 3.2	2,993 3.6	2,967 -0.9	2,963 -0.1	3,020 1.9	3,186 5.5	3,211 0.8
Other transportation	460 4.8	397 -13.6	403 1.4	394 -2.2	400 1.5	393 -1.6	391 -0.6	396 1.3	402 1.5	406 1.0
Accommodation	3,388 9.7	3,419 0.9	3,329 -2.6	3,424 2.8	3,408 -0.5	3,300 -3.2	3,028 -8.2	2,991 -1.2	3,021 1.0	2,949 -2.4
Hotels	2,414 11.4	2,438 1.0	2,366 -3.0	2,449 3.5	2,444 -0.2	2,376 -2.8	2,185 -8.0	2,132 -2.4	2,143 0.5	2,102 -1.9
Motels	619 8.1	605 -2.2	592 -2.2	594 0.4	582 -2.0	562 -3.5	510 -9.3	513 0.7	534 4.1	508 -4.9
Other accommodation	356 1.7	376 5.7	371 -1.3	381 2.6	382 0.3	363 -5.0	334 -7.9	346 3.7	344 -0.6	339 -1.5
Food and beverage services	3,984 -4.6	3,467 -13.0	3,524 1.7	3,619 2.7	3,728 3.0	3,802 2.0	3,789 -0.3	3,886 2.5	4,034 3.8	4,074 1.0
Meals, from accommodation services	557 -7.6	494 -11.4	491 -0.5	498 1.4	514 3.3	533 3.7	519 -2.5	530 2.0	551 4.0	532 -3.4
Meals, from food and beverage services	2,415 -3.4	2,094 -13.3	2,150 2.7	2,217 3.1	2,294 3.5	2,269 -1.1	2,265 -0.2	2,335 3.1	2,421 3.7	2,469 2.0
Alcohol, from accommodation services	337 -10.7	291 -13.7	292 0.5	285 -2.5	276 -3.0	283 2.6	275 -3.0	279 1.6	288 3.2	280 -2.8
Alcohol, from food and beverage services	546 -3.1	470 -13.9	476 1.2	506 6.3	526 4.0	590 12	597 1.2	604 1.2	627 3.8	637 1.6
Meals and alcohol, from other industries	129 -1.1	118 -8.6	115 -2.4	114 -1.2	118 3.7	126 7.1	133 5.5	138 3.8	147 6.5	156 6.1
Other tourism commodities	2,397 1.6	2,199 -8.3	2,176 -1.0	2,326 6.9	2,420 4.1	2,612 7.9	2,752 5.4	2,912 5.8	3,036 4.3	3,109 2.4
Recreation and entertainment	1,448 -5.5	1,306 -9.8	1,262 -3.4	1,315 4.2	1,299 -1.2	1,403 8.0	1,451 3.5	1,521 4.8	1,604 5.5	1,648 2.7
Travel agency services	895 15.0	840 -6.1	863 2.7	955 10.7	1,065 11.5	1,150 7.9	1,246 8.4	1,345 7.9	1,383 2.8	1,412 2.1
Convention fees	54 10.5	52 -2.4	51 -2.4	55 7.5	56 2.3	60 6.8	55 -8.5	46 -16.1	49 6.5	49 --
Total tourism commodities	21,972 -1.1	20,226 -7.9	20,445 1.1	21,005 2.7	21,445 2.1	21,649 1.0	21,884 1.1	22,355 2.2	23,014 2.9	23,460 1.9
Total other commodities	5,294 2.5	5,387 1.8	5,457 1.3	5,533 1.4	5,556 0.4	5,576 0.4	5,591 0.3	5,687 1.7	5,944 4.5	6,200 4.3
Total tourism expenditures	27,266 -0.4	25,614 -6.1	25,902 1.1	26,538 2.5	27,000 1.7	27,225 0.8	27,475 0.9	28,042 2.1	28,958 3.3	29,660 2.4

-- amount too small to be expressed.

Source: National Tourism Indicators, Catalogue no. 13-009.

Table 6.5

Tourism Demand by Non-residents (exports) - Canada

Millions of dollars and percentage change from preceding year

	Years									
	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Transportation	1,964 5.5	1,906 -3.0	1,924 0.9	2,108 9.6	2,503 18.7	2,908 16.2	3,205 10.2	3,347 4.4	3,613 7.9	3,919 8.5
Passenger air transport	1,157 0.3	1,092 -5.6	1,081 -1.0	1,199 10.9	1,429 19.2	1,642 14.9	1,799 9.6	1,889 5.0	2,004 6.1	2,170 8.3
Passenger rail transport	42 5.0	39 -7.1	37 -5.1	41 10.8	50 22.0	61 22.0	67 9.8	71 6.0	83 16.9	88 6.0
Interurban bus transport	69 21.1	78 13	91 16.7	98 7.7	120 22.4	140 16.7	159 13.6	168 5.7	189 12.5	201 6.3
Vehicle rental	267 20.8	272 1.9	297 9.2	326 9.8	393 20.6	486 23.7	540 11.1	549 1.7	599 9.1	653 9.0
Vehicle repairs and parts	46 4.5	47 2.2	46 -2.1	49 6.5	56 14.3	62 10.7	67 8.1	69 3.0	80 15.9	83 3.8
Vehicle fuel	277 12.1	268 -3.2	258 -3.7	268 3.9	307 14.6	348 13.4	385 10.6	398 3.4	424 6.5	469 10.6
Other transportation	106 8.2	110 3.8	114 3.6	127 11.4	148 16.5	169 14.2	188 11.2	203 8.0	234 15.3	255 9.0
Accommodation	1,634 8.0	1,609 -1.5	1,668 3.7	1,807 8.3	2,043 13.1	2,329 14.0	2,588 11.1	2,813 8.7	3,159 12.3	3,424 8.4
Hotels	1,264 6.8	1,227 -2.9	1,271 3.6	1,382 8.7	1,570 13.6	1,795 14.3	1,999 11.4	2,214 10.8	2,475 11.8	2,688 8.6
Motels	189 11.8	199 5.3	211 6.0	228 8.1	255 11.8	286 12.2	311 8.7	324 4.2	363 12.0	390 7.4
Other accommodation	181 12.4	183 1.1	186 1.6	197 5.9	218 10.7	248 13.8	278 12.1	275 -1.1	321 16.7	346 7.8
Food and beverage services	1,625 8.2	1,710 5.2	1,755 2.6	1,899 8.2	2,227 17.3	2,509 12.7	2,759 10.0	2,911 5.5	3,290 13.0	3,541 7.6
Meals, from accommodation services	244 4.7	259 6.1	256 -1.2	278 8.6	322 15.8	362 12.4	395 9.1	400 1.3	451 12.8	486 7.8
Meals, from food and beverage services	972 9.0	1,019 4.8	1,054 3.4	1,137 7.9	1,339 17.8	1,515 13.1	1,672 10.4	1,783 6.6	2,016 13.1	2,170 7.6
Alcohol, from accommodation services	149 4.2	154 3.4	152 -1.3	166 9.2	192 15.7	214 11.5	233 8.9	241 3.4	271 12.4	292 7.7
Alcohol, from food and beverage services	208 11.2	223 7.2	236 5.8	256 8.5	301 17.6	336 11.6	368 9.5	390 6.0	440 12.8	471 7.0
Meals and alcohol, from other industries	52 10.6	55 5.8	57 3.6	62 8.8	73 17.7	82 12.3	91 11.0	97 6.6	112 15.5	122 8.9
Other tourism commodities	641 10.9	676 5.5	718 6.2	786 9.5	884 12.5	1,011 14.4	1,132 12.0	1,169 3.3	1,321 13.0	1,424 7.8
Recreation and entertainment	588 10.1	625 6.3	660 5.6	723 9.5	811 12.2	930 14.7	1,041 11.9	1,073 3.1	1,216 13.3	1,310 7.7
Travel agency services	24 41.2	24 --	27 12.5	31 14.8	37 19.4	45 21.6	50 11.1	50 --	57 14.0	63 10.5
Convention fees	29 7.4	27 -6.9	31 14.8	32 3.2	36 12.5	36 --	41 13.9	46 12.2	48 4.3	51 6.3
Total tourism commodities	5,864 7.5	5,901 0.6	6,065 2.8	6,600 8.8	7,657 16.0	8,757 14.4	9,684 10.6	10,240 5.7	11,383 11.2	12,308 8.1
Total other commodities	1,479 5.3	1,483 0.3	1,539 3.8	1,689 9.7	1,922 13.8	2,200 14.5	2,418 9.9	2,494 3.1	2,806 12.5	2,980 6.2
Total tourism expenditures	7,343 7.1	7,384 0.6	7,604 3.0	8,289 9.0	9,579 15.6	10,957 14.4	12,102 10.4	12,734 5.2	14,189 11.4	15,288 7.7

-- amount too small to be expressed.

Source: National Tourism Indicators, Catalogue no. 13-009.

Table 6.6

Tourism Demand by Non-residents (exports) - Canada

Millions of 1992 dollars and percentage change from preceding year

	Years									
	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Transportation	2,039	1,865	1,924	2,096	2,371	2,706	2,990	3,111	3,362	3,570
	0.4	-8.5	3.1	8.9	13.1	14.1	10.5	4.0	8.1	6.2
Passenger air transport	1,201	1,057	1,081	1,191	1,333	1,546	1,728	1,812	1,917	2,064
	-2.7	-12.0	2.3	10.2	12.0	15.9	11.8	4.8	5.8	7.7
Passenger rail transport	54	44	37	41	46	52	57	59	66	68
	-9.4	-17.2	-16.7	10.0	13.6	12.0	10.7	2.9	11.9	3.0
Interurban bus transport	88	85	91	96	116	132	144	148	159	166
	5.7	-3.6	7.4	5.2	21.3	13.5	9.5	2.5	7.4	4.4
Vehicle rental	260	263	297	324	368	415	456	474	518	553
	14.9	1.3	12.8	9.0	13.6	12.9	9.8	4.0	9.3	6.8
Vehicle repairs and parts	47	46	46	48	56	62	65	67	70	72
	--	-2.6	--	5.3	15.0	10.9	5.9	2.5	4.5	2.9
Vehicle fuel	268	261	258	274	312	342	367	374	435	435
	0.5	-2.8	-1.0	6.3	13.8	9.7	7.4	1.8	16.3	--
Other transportation	121	110	114	122	140	157	172	177	197	212
	5.7	-9.0	3.7	7.1	14.3	12.5	9.4	3.1	11.3	7.6
Accommodation	1,658	1,602	1,668	1,791	1,965	2,144	2,333	2,479	2,660	2,757
	4.8	-3.4	4.1	7.4	9.7	9.1	8.8	6.2	7.3	3.6
Hotels	1,283	1,221	1,271	1,370	1,509	1,653	1,803	1,951	2,084	2,165
	3.7	-4.8	4.1	7.8	10.2	9.5	9.1	8.2	6.8	3.9
Motels	192	198	211	225	246	263	279	286	305	313
	8.1	3.1	6.6	6.8	9.0	7.3	5.9	2.5	6.6	2.6
Other accommodation	184	184	186	196	210	228	252	242	271	279
	10.0	--	1.3	5.2	7.3	8.5	10.5	-3.8	12.0	3.0
Food and beverage services	1,839	1,745	1,755	1,869	2,168	2,403	2,606	2,706	2,981	3,142
	3.0	-5.1	0.5	6.5	16.0	10.8	8.5	3.8	10.2	5.4
Meals, from accommodation services	275	263	256	274	313	345	371	369	403	420
	--	-4.4	-2.6	6.9	14.4	10.4	7.5	-0.6	9.2	4.2
Meals, from food and beverage services	1,097	1,039	1,054	1,122	1,305	1,447	1,574	1,649	1,823	1,926
	4.0	-5.3	1.4	6.4	16.3	10.9	8.7	4.8	10.6	5.7
Alcohol, from accommodation services	171	158	152	162	188	208	224	229	249	260
	-0.8	-7.6	-3.6	6.6	15.9	10.7	7.6	2.4	8.7	4.4
Alcohol, from food and beverage services	237	229	236	250	292	325	352	369	405	427
	5.1	-3.6	3.1	6.1	16.6	11.3	8.4	4.9	9.8	5.4
Meals and alcohol, from other industries	58	57	57	61	71	78	86	90	101	109
	2.4	-2.3	--	7.3	15.9	9.8	10.7	4.4	12.2	7.9
Other tourism commodities	733	696	718	772	848	937	1,015	1,020	1,121	1,168
	3.4	-5.0	3.1	7.6	9.8	10.5	8.2	0.5	9.9	4.2
Recreation and entertainment	676	644	660	710	777	859	929	930	1,025	1,065
	2.7	-4.8	2.5	7.6	9.4	10.6	8.1	0.1	10.2	3.9
Travel agency services	26	24	27	31	36	43	47	47	52	57
	26.7	-5.3	11.1	15.0	17.4	18.5	9.4	-0.5	10.6	9.6
Convention fees	31	28	31	31	35	35	39	43	44	46
	4.3	-8.3	9.1	--	12.5	--	11.1	11.0	2.3	4.5
Total tourism commodities	6,269	5,910	6,065	6,528	7,352	8,190	8,945	9,316	10,124	10,637
	2.6	-5.7	2.6	7.6	12.6	11.4	9.2	4.1	8.7	5.1
Total other commodities	1,565	1,504	1,539	1,653	1,859	2,089	2,265	2,301	2,544	2,672
	0.8	-3.9	2.3	7.4	12.5	12.4	8.4	1.6	10.6	5.0
Total tourism expenditures	7,834	7,414	7,604	8,181	9,211	10,279	11,210	11,617	12,668	13,309
	2.3	-5.4	2.6	7.6	12.6	11.6	9.1	3.6	9.0	5.1

-- amount too small to be expressed.

Source: National Tourism Indicators, Catalogue no. 13-009.

Table 6.7

Employment Generated by Tourism

Thousands of employed persons and percentage change from preceding year

	Years									
	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Transportation	81.7 3.2	79.4 -2.8	79.7 0.3	79.2 -0.5	80.2 1.2	80.3 0.2	83.2 3.5	87.4 5.1	91.4 5.2	95.0 3.6
Air transportation	36.9 3.4	35.9 -2.5	34.9 -3.0	34.5 -1.0	35.8 3.7	36.2 1.2	38.7 6.8	42.1 8.9	45.6 8.3	48.0 5.4
Railway transportation	5.8 -6.5	5.7 -0.9	5.6 -3.1	5.3 -4.1	5.2 -3.3	5.0 -3.4	4.4 -11.6	4.2 -5.1	4.0 -4.2	4.0 -6.3
Water transportation	2.6 --	2.6 --	2.5 -1.0	2.5 -2.0	2.5 -1.0	2.4 -2.0	2.3 -4.2	1.9 -16.3	2.0 1.3	2.0 5.1
Bus transportation	11.3 7.1	11.1 -2.0	12.3 11.3	12.1 -1.8	12.3 1.4	12.5 1.6	13.1 4.6	13.5 3.4	14.0 3.3	14.0 2.9
Taxicabs	14.9 4.9	13.8 -7.1	13.4 -2.9	13.4 -0.2	12.4 -7.5	11.5 -7.1	11.5 -0.4	11.1 -3.3	11.2 0.9	11.3 0.9
Vehicle rental and leasing	10.3 2.5	10.3 -0.2	11.0 6.6	11.4 4.1	12.1 6.1	12.7 4.9	13.3 4.1	14.6 9.8	15.2 4.1	15.7 3.5
Accommodation	131.1 0.6	122.2 -6.8	124.8 2.1	123.9 -0.7	130.2 5.1	131.1 0.7	136.8 4.3	137.4 0.5	142 3.3	143.4 1.0
Food and beverage services	128.4 0.9	120.8 -5.9	122.4 1.3	129.7 6.0	130.6 0.6	135.8 4.0	136.7 0.6	140.6 2.9	143.1 1.8	143.1 --
Other tourism industries	31.8 1.5	28.7 -9.9	29.1 1.4	29.1 0.2	31 6.6	30.9 -0.4	29.8 -3.6	29.8 0.1	30.1 0.9	30.2 0.2
Recreation and entertainment	24.4 0.3	22.1 -9.4	22.3 0.9	21.6 -3.0	22.9 5.9	22.5 -1.6	21.1 -6.2	20.9 -1.3	21.3 1.9	21.3 0.4
Travel agencies	7.4 6.0	6.6 -12.0	6.8 3.0	7.5 11.0	8.1 9.0	8.4 3.0	8.7 3.0	9.0 4.0	8.8 -1.0	8.8 --
Total tourism industries	373.0 1.3	351.0 -5.9	355.8 1.4	361.9 1.7	371.9 2.8	378.2 1.7	386.3 2.2	395.2 2.3	407.1 3.0	411.8 1.2
Other industries	108.7 1.3	102.4 -5.9	103.8 1.4	101.8 -1.9	102.5 0.7	103.1 0.5	105.6 2.5	108.0 2.3	111.3 3.0	113.0 1.1
Tourism activities	481.7 1.3	453.4 -5.9	459.6 1.4	463.7 0.9	474.4 2.3	481.2 1.4	491.9 2.2	503.2 2.3	518.3 3.0	524.3 1.2

-- amount too small to be expressed.

Source: National Tourism Indicators, Catalogue no. 13-009.

DEFINITIONS

DEFINITIONS

Chapter 1

Concepts of tourism

According to the World Tourism Organisation and the United Nations Commission tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes. The use of this broad concept makes it possible to identify tourism between countries as well as tourism within a country. "Tourism" refers to all activities of visitors, including both "tourists" (overnight visitors) and "same-day visitors".

Forms of tourism

In relation to a given country, the following forms of tourism can be distinguished:

- a) Domestic tourism, involving residents of the given country travelling only within this country;
- b) Inbound tourism, involving non-residents travelling in the given country;
- c) Outbound tourism, involving residents travelling in another country.
- d) National tourism, which includes domestic and outbound tourism
- e) Internal tourism, which includes domestic and inbound tourism
- f) International tourism, which includes inbound and outbound tourism

Chapter 2, 3 and 7

Trip

In the Canadian Travel Survey (CTS), a trip is defined as travel to a Canadian destination at least 80 km one-way from home for any reason except:

- travel to and from work or school (i.e. commuting);
- one-way travel involving a change of residence;
- travel of operating crew members of buses, airplanes, boats, etc;
- travel in an ambulance to a hospital or clinic;
- trips that do not originate in Canada; and
- trips longer than one year.

A trip may involve one person travelling alone or several persons from the same household travelling together. Persons from different households travelling together are defined as taking different trips.

The CTS collects information about trips beyond those that are defined by the destination and distance criteria above. Except for the types of travel that are excluded in the definition above, information is also collected about: i) travel to destinations outside Canada; ii) overnight travel regardless of distance, i.e. less than 80 km one-way from home; and iii) same-day travel of at least 40 km one-way from home for trips originating in Ontario, i.e. between 40 and 80 km one way from home.

In the International Travel Survey (ITS), a trip is defined as travel for any reason by anybody arriving or returning to Canada who is cleared through Customs and Immigration points of entry. ITS includes travellers coming/returning to Canada for/after a period of less than 12 months and excludes the following types of international travellers:

- immigrants;
- former residents (Canadian citizens returning to Canada to re-establish permanent residence after residing outside Canada for more than one year)
- military personnel, diplomats and dependants; and
- crews.

In the ITS, travellers entering Canada for the following reasons are included:

- business, commuting to work or other works;
- attending a convention, conference or seminar;
- study, summer resident;
- visiting friends or relatives;
- pleasure, holiday, vacation, health and shopping; and
- persons travelling in transit who clear Canada Customs.

For the purpose of the report *Tourism in Canadian Cities: A Statistical Outlook 1999*, the following three components are included: Canadian travelling in Canada, non-residents travelling in Canada and the Canadian portion of trips made by Canadians to a foreign destination as long as those trips contain at least one night in Canada.

However, in this report, travellers who enter Canada for the following reasons are excluded:

- commuting to work;
- study; and
- persons travelling in transit who clear Canada Customs and Revenue Agency.

Same-day trip

In the CTS, a trip which does not include a night away from home.

In the ITS, same-day travel encompasses travellers who enter and leave the country in less than 24 hours.

Overnight trip

In the CTS, a trip that includes at least one night away from home.

In the ITS, travel of one or more nights includes travellers staying at least 24 hours in a country other than that in which he/she resides.

Person-trip

In the CTS, a person-trip starts when the traveller leaves his/her home to go on a trip. The total number of person-trips for a population is the count of the total number of persons on each trip taken in the population.

In the ITS, each time a non-resident traveller enters Canada it is the beginning of a person-trip. The traveller's entry is recorded by Canada Customs. The person-trip ends when the traveller leaves Canada. For residents, each time a person departs from Canada, a person-trip begins. The person-trip ends when the traveller returns to Canada. If a person travels with other persons, the number of person-trips will equal the number of persons on the trip. If four persons go on a trip together, it counts as four person-trips. If the same person takes two trips, it counts as two person-trips.

Travel party

In the CTS, a travel party is defined as one or more persons from the same household travelling together.

In the ITS, a travel party is defined as persons from the same country travelling together (whether they are from the same household or not) who agree to report collectively their trip characteristics.

Purpose of trip

In the CTS, the main reason the respondent to the survey went on a trip, regardless of the reason anyone else from the household had for taking the same trip.

In the ITS, the main reason the travel party went on a trip.

Purpose of trip includes the following categories:

- Visiting friends or relatives
- Pleasure
- Business
- Personal reasons and other

Origin or residence

In the CTS, the origin of the trip corresponds to the respondent's place of residence at the time the trip was taken.

In the ITS, the origin or residence is the place of last permanent residence, by state for United States residents, by country for overseas residents and by province of residence for Canadian residents.

Destination

In the CTS, the place visited and reported by the respondent as the destination of a trip. If a respondent visited more than one place during a trip, the destination is the place furthest from his/her home.

In the ITS, the respondent does not report a destination. Only the locations visited are reported.

Mode of transportation

In the CTS, only one mode of transportation is recorded. It is the mode of transportation used to travel the greatest distance during a trip.

In the ITS, for each trip in Canada, the mode of transportation to enter and exit Canada is captured as well as any mode of transportation that was used to travel while in Canada. In the case of a trip abroad, the mode of transportation used to leave Canada, to re-enter Canada and all modes used to travel outside the country are captured.

Distance

In the CTS, one-way distance between the trip origin and its destination expressed in kilometres.

In the ITS, this variable is not available.

Trip duration

In the CTS, a trip starts when the respondent leaves his/her usual residence. It ends when he/she comes back. The trip duration is measured by the number of nights a respondent spends away from his/her usual residence.

In the ITS, a non resident trip starts when a person enters Canada and ends when he/she leaves the country. The trip duration is measured by the number of nights a traveller spends in Canada. A trip by a Canadian resident starts when the traveller leaves Canada and ends when he/she re-enters the country. In that case, trip duration is measured by the number of nights spent abroad.

Type of entry in the country

In the CTS, this variable is not applicable.

In the ITS, overseas travellers are grouped by type of entry in Canada. Four categories are found:

- Direct to Canada.
- Via the United States – by land – same-day trip
- Via the United States – by land – overnight trip
- Via the United States – by other methods

Visit

Same-day visit

In the CTS, a same-day visit can only be made on the course of a same-day trip. In such a case, a visit is recorded at the destination of the trip.

In the ITS, on the course of a same-day trip, a non-resident traveller may visit different location(s); each location visited will be assigned a visit. Only one location is captured on a same-day trip. On the course of an overnight trip, every location visited where the respondent has not spent a night is recorded as a same-day visit.

Overnight visit

Both in the CTS and the ITS, an overnight visit can only be done on an overnight trip. In such a case, the location visited is defined as the location where the respondent has spent at least one night. If, during the same trip, multiple nights are spent at the same location, or the same location is travelled to multiple times for overnight stay, only one visit is recorded for that location.

Person-visit

Same-day or overnight visit made by a person taking a trip.

In the CTS, the total number of person-visits for a population is the count of the number of visits made by each person in the population on each trip taken.

In the ITS, the total number of person-visits made by travellers is the total number of visits made by each person, on each travel party, on each trip taken.

The unit of measure used in this report is a person-visit.

Travel receipts

Travel receipts are the expenditures in Canada by non-residents travellers (including crews) incidental to travel including purchases of goods to be imported for personal use by travellers. Among these would be expenditures abroad for lodging, food, entertainment, local and intercity transportation, gifts, medical care, student expenses and all other purchases of personal goods and services.

Travel payments

Travel payments are the expenditures abroad by Canadian resident travellers (including Canadian crews) incidental to travel including purchases of goods to be imported for personal use by travellers. Among these would be expenditures abroad for lodging, food, entertainment, local and intercity transportation, gifts, medical care, student expenses and all other purchases of personal goods and services.

Chapter 4

Transborder services

Services between points in Canada and Alaska, Canada and Hawaii and Canada and continental United States.

Charters services

Transportation of persons and /or goods pursuant to a contract where a person other than the air carrier other that operates the air service reserves a block of seats or part of the cargo space for their own use or for resale, in whole or in part, to the public.

Scheduled services

Transportation of persons and/or goods where the air carrier or his agent operates the air service and sells directly to the public, seats and/or cargo space on a price per seat or per unit of mass or volume of cargo basis.

City-Pair

Two cities between which travel is authorized by a ticket or part of a ticket

Intercity and Rural Transportation

This industry comprises companies primarily engaged in providing passenger transportation principally outside a municipality and its suburban areas.. These companies operate over fixed routes and schedules, and charge a per-trip fee.

Charter Bus Industry

This industry comprises companies engaged in providing charter bus services. The charter bus companies normally do not operate over fixed routes and schedules, and rent the entire vehicle with driver.

Chapter 5

Accommodation Services Industries

This major group of industries includes establishments primarily engaged in providing short-term lodging for travellers, vacationers and others. In addition to lodging, a range of other services may be provided. For example, many establishments have restaurants, while others have recreational facilities.

Establishments are distributed in three groups:

- 1) Hotels and Motor-Hotels
NAICS 721111 Hotels
NAICS 721112 Motor Hotels
NAICS 721113 Resorts
NAICS 721120 Casino Hotels
- 2) Motels
NAICS 721114 Motels
- 3) Other accommodation industries
NAICS 721191 Bed and Breakfast
NAICS 721192 Housekeeping Cottages and Cabins
NAICS 721211 RV Parks and Campgrounds

NAICS 721212	Hunting and Fishing camps
NAICS 721123	Recreational and Vacation camps (except hunting and fishing camps)
NAICS 721310	Rooming and Boarding Houses

Hotels

Establishments which provides short-stay suites or guests rooms with a multi-storey or high-rise structure, accessible from the interior only; may provide range of complimentary services and amenities, such as meals and beverages services, parking, laundry services, swimming pools and exercise rooms, and conference and convention facilities.

Motor Hotels

Establishments which is designed to accommodate clients travelling by motor vehicle and provide short-stay suites or guest rooms within a low-rise structure, characterised by ample, convenient parking areas, interior access to rooms, and their location along major roads. Limited complimentary services and amenities may also be provided.

Resorts

Establishments which is primarily engaged in providing short-term lodging in facilities known as resorts. These establishments feature extensive indoor and/or outdoor leisure activities on the premises on a year-round basis. Resorts are designed to accommodate vacationers and provide full service suites and guest rooms, typically in a non-urban setting next to lakes, rivers or mountains; may provide access to conference facilities.

Casino Hotels

Establishments which provides short-term lodging in facilities with a casino on the premises. The casino operation includes table wagering games and may include other gambling activities such as slot machines and sports betting. These establishments generally offer a range of services and amenities, such as food and beverage services, entertainment, valet parking, swimming pools and convention facilities.

Motels

Establishments which is designed to accommodate clients travelling by motor vehicle, and provide short-stay suites or guests rooms, within a one or two storey structure, characterised by exterior access to rooms and ample

parking areas adjacent to the rooms entrances. Limited complimentary services and amenities may also be provided.

All other Traveller Accommodation

Bed and breakfast

Establishments which provides guest rooms in private homes or in small buildings converted for this use, and they often possess a unique or historic character. Bed and breakfast homes are characterised by a highly personalised service and the inclusion, in the room rate, of a full breakfast, served by the owner or owner-supervised staff.

Housekeeping Cottages and Cabins

Establishments which provides short-term lodging in facilities known as housekeeping cottages and cabins. These establishments are designed to accommodate vacationers and may include access to private beaches and fishing.

RV (Recreational vehicle) Parks and Campgrounds

Establishments primarily engaged in operating serviced or unserviced sites to accommodate campers and their equipment, including tents, trailers, travel trailers and RVs (recreational vehicles). These establishments may provide access to facilities, such as washrooms, laundry rooms, recreation halls and facilities, and stores and snack bars.

Hunting and Fishing Camps

Establishments primarily engaged in operating hunting and fishing camps. These establishments provide a range of services, such as access to outpost camps or housekeeping cabins, meals and guides, and they may also provide transportation to the facility, and sale of food, beverages and hunting and fishing supplies.

Recreational (except Hunting and Fishing) and Vacation Camps

Establishments primarily engaged in operating overnight recreational camps such as children's camps, family vacation camps, and outdoor adventure retreats that offer trail riding, white-water rafting, hiking and similar activities. These establishments provide accommodation facilities, such as cabins and fixed camp sites, and other amenities, such as food services, recreational facilities and equipment, and organised recreational activities.

Rooming and Boarding Houses

Establishments primarily engaged in operating rooming and boarding houses and similar facilities. These establishments provide temporary or long-term accommodation, which, for the period of occupancy may serve as a principal residence. These establishments may also provide complementary services, such as housekeeping, meals and laundry services. Boarding houses, Rooming houses, fraternity residential houses, Sorority residential houses, residential clubs, workers' camp or hostel (at work site).

Food and Beverage Industries

Full-Service Restaurant

An establishment where patrons order while seated (e.g. fine dining).

Limited Service Eating Place

An establishment where patrons order or select food or beverage at a counter, food bar, public cafeteria and/or order by phone.

Food Service Contractor

An establishment primarily engaged in supplying food services under contract for a specific period of times (e.g. airlines, institutions and government)

Caterer

An establishment primarily engaged in providing food services for social events such as parties, weddings or receptions and business events.

Mobile Food Service

An establishment primarily engaged in preparing and serving food and beverages for immediate consumption from motorised vehicles or non-motorised carts.

Drinking Places

An establishment engaged in preparing and serving alcoholic beverages and limited food services for immediate consumption (e.g. bars, taverns, pubs, night-clubs). Also includes bars operating video gaming or other gambling machines.

Travel Agencies

Businesses mainly acting as ticket and travel agents, furnishing travel information, acting as agents in arranging tours, booking accommodation and transportation for travellers or acting as independent agencies for transportation companies.

Tour Operators

Businesses in this industry are primarily engaged in developing, designing and wholesaling travel tour plans and package vacation tours.

Chapter 6

Tourism

The most important concept underlying the TSA (Tourism Satellite Account) and the NTI (National Tourism Indicators), that of «tourism», has been evolving over time. The definition used here is the one most recently adopted by the World Tourism Organisation and the United Nations Statistical Commission: «the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes»¹

This definition goes beyond the concept of tourism as merely travel for leisure. It also encompasses travel for business purposes, to visit friends and relatives or for personal reasons, such as health treatment. On the other hand, not all travel constitutes tourism. Excluded are commuting to and from work, travel for purposes of study or job relocation, as well as travel by migrants and diplomats or members of the armed forces on assignment.

In relation to Canada, the definition comprises different forms of tourism: travel by Canadians within Canada (domestic tourism), travel by non-residents to Canada (inbound tourism) and travel by Canadians to another country (outbound tourism). Also, in Canada, the «usual environment» is defined as being within 80 kilometres of home. Any travel by a resident to a Canadian location under that distance from home is not considered «tourism». However, crossing an international boundary is generally considered to be travel outside the «usual environment».

Visitors

The persons undertaking tourism are referred to as either tourists (those visitors who stay overnight or longer in the location visited), or same-day visitors.

Tourism Commodities

A commodity is defined as a good or service which is sold at a price designed to cover the cost of production, e.g. a hotel room, a meal, an airline ticket, a t-shirt. For purposes of tourism commodities are classified into two categories: tourism commodities and non-tourism commodities.

A commodity is referred to as a tourism commodity if a significant part of its total demand in Canada comes from visitors. Otherwise, it is referred to as a non-tourism commodity. Thus, accommodation is considered to be a tourism commodity, because a substantial proportion of its demand is from tourism. However, beer bought in stores is classified as a non-tourism commodity, since purchases by visitors represent a small proportion of total sales in Canada.

The definition of tourism commodities is based on recommendations from the National Task Force on Tourism Data.

Tourism Industries

An industry is defined as a group of operating units or establishments engaged in the same or similar kind(s) of economic activity, e.g., hotels, restaurants, airlines, department stores. Industries produce commodities, both tourism and non-tourism.

While the commodities purchased by visitors may be supplied by several industries, the TSA and the NTI focus on industries which are the main producers of the tourism commodities. Accordingly, a 'tourism industry' is so considered here if:

- a) it provides tourism commodities to visitors, and
- b) it would cease to exist without tourism or would continue to exist only at a significantly reduced level of activity.

Air transportation satisfies part a) and the first criterion of part b) of the definition, for instance, while food and beverage services satisfy part a) and the second criterion of part b). An example of a non-tourism industry, one that does not satisfy either criterion of the second part of the definition, is

the food stores industry, even though purchases by visitors are important for this industry in certain locations. An example of a non-tourism industry, because it does not satisfy part a), is the steel foundries industry. This industry does not sell its products to visitors.

The definition of tourism industries is drawn from recommendations by the National Task Force on Tourism Data.

Domestic Supply

The domestic supply of tourism commodities is defined as the total production in Canada of the specified commodities. It does not include imports. For example, the sale of a ticket on a non-Canadian airline is excluded from the supply of passenger air transport.

Total Tourism Demand in Canada

Tourism demand for tourism commodities is defined as expenditures made by visitors on the domestically produced tourism goods and services. It includes expenses made before and after a trip, such as purchases of vehicle repairs and parts, as well as those incurred during a trip, such as purchases of accommodation and meals. Tourism demand comprises three broad categories: tourism demand in Canada, that is, total demand by visitors for Canadian produced commodities, and its two components, tourism domestic demand and tourism exports.

- **Tourism Domestic Demand** consists of spending by Canadian visitors on domestically produced commodities. It includes purchases of Canadian commodities which result from domestic and outbound tourism. For example, it includes the purchase of an air fare from a Canadian carrier to a destination outside Canada.
- **Tourism Exports** is defined as spending by non-resident visitors on Canadian produced commodities. It comprises purchases of Canadian commodities as a result of inbound tourism, including spending that may take place outside of Canada, such as the purchase of an airline ticket from a Canadian international carrier, to travel to Canada.

The entire domestic supply of tourism commodities is not purchased by visitors. For example, only part of food and beverage services are purchased by visitors in or to Canada, while most are purchased for local consumption. Therefore, domestic supply is always greater than tourism demand.

- **Tourism Imports** are purchases of foreign produced goods and services by Canadian tourists and same-day visitors while travelling outside Canada. It comprises purchases of foreign commodities as a result of outbound tourism, including spending that may have taken place in Canada, such as the purchase of an airline ticket from a foreign international carrier, to travel to a destination abroad.

Employment

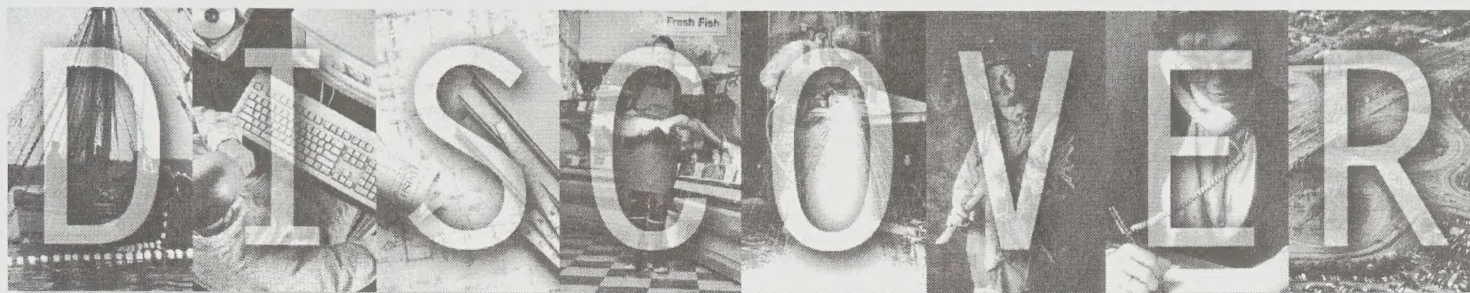
The employment data presented in the TSA and NTI are benchmarked to the 'person-year' concept incorporated in the I/O (Input-Output) annual estimates used for productivity measurement. A person-year so defined can be a person

employed on either a fulltime or a part-time basis (that is, in terms of the number of hours worked per day or per week). A person working for half the months in the year on the other hand, would be defined as half a person-year. The published annual and quarterly estimates in the NTI correspond to the annual or quarterly averages of the monthly estimates provided by the surveys conducted by Statistics Canada. Full-time is defined as usually working a minimum of 30 hours per week. The average full-time hours per week for a given industry is the average of usual hours worked by those working a minimum of 30 hours per week.

¹ United Nations and World Tourism Organisation, Recommendations on Tourism Statistics, New York, 1994. P.5

DATA SOURCES

STATISTICS CANADA SURVEY	PUBLICATION
Canadian Travel Survey	Cat. No. 87-504
International Travel Survey	Cat. No. 66-201
Canadian Civil Aviation	Cat. No. 51-206
Air Charter Statistics	Cat. No. 51-207
Air Passenger O&D Survey	Cat. No. 51-204
Air Passenger O&D Survey	Cat. No. 51-205
Road Motor Vehicle: Registrations	Cat. No. 53-219
New Motor Vehicle Sales Survey	Cat. No. 63-007
Railway Transport Survey	Cat. No. 52-215
Passenger Bus and Urban Transit Survey	Cat. No. 53-215
Restaurant, Caterer and Tavern Survey	Cat. No. 63-011
Annual Survey of Arts, Entertainment and Recreation	Cat. No. 63-233
Traveller Accommodation Survey	Cat. No. 63-204
Annual Survey of Travel Arrangements	Cat. No. 63-016
Survey of Vehicles in Canada	Cat. No. 53-F0004
Survey of Heritage Institutions	Cat. No. 63-233
Census of Population	Cat. No. 92-925
Census of Population	Cat. No. 92-920
Consumer Price Index	Cat. No. 62-010
Tourism Satellite Account	Cat. No. 13-001
National Tourism Indicators	Cat. No. 13-009



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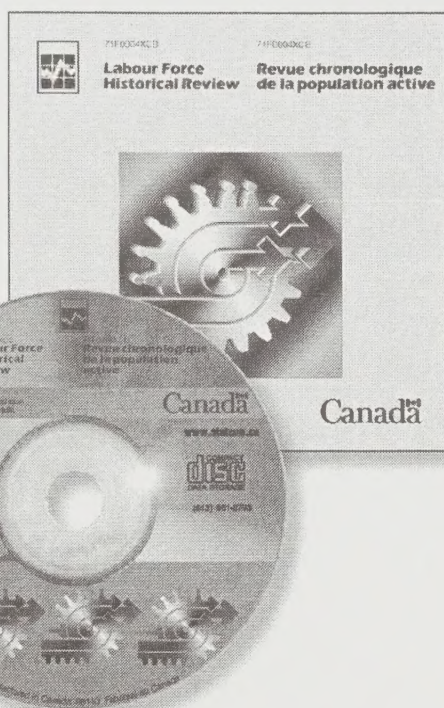
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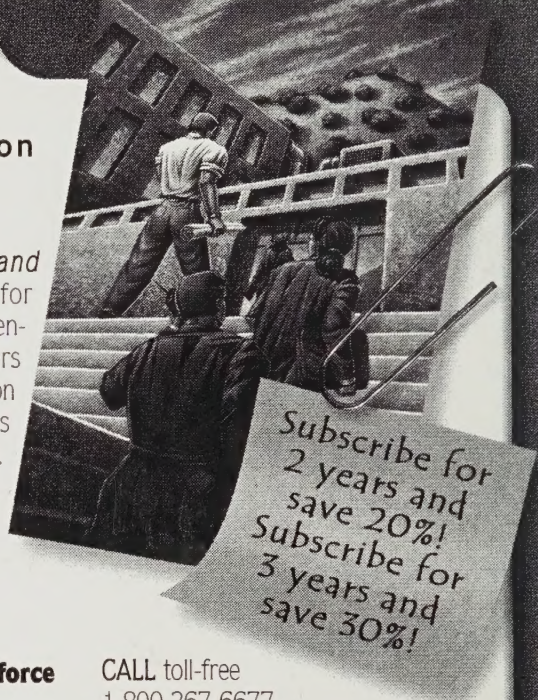
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